The Investment Property Club
The Property Investors Community

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How to use the Portfolio Manager

The Portfolio Manager is powerful and easy to use property management software which allows you to keep all of your property information in one place and get a global view of your portfolio as it grows.

This brief guide will help you to quickly get the most out of your portfolio manager.

If you have any questions for us please visit our contact page.

About Screens

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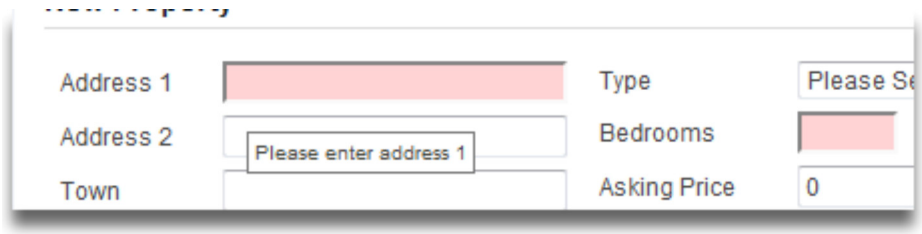
All of the screens in the property software are designed to be simple to understand and quick and easy to use.

Each screen is set up to be flexible enough to allow you to enter as much or as little information as you need so if you don't have all of the details to hand you can return later to enter them.

If you miss any mandatory data when you fill out a screen the software will prompt you enter the missing details by highlighting the required fields in red. Roll your mouse over the highlighted field for instructions on the data you need to enter.



About Contacts

^ Top

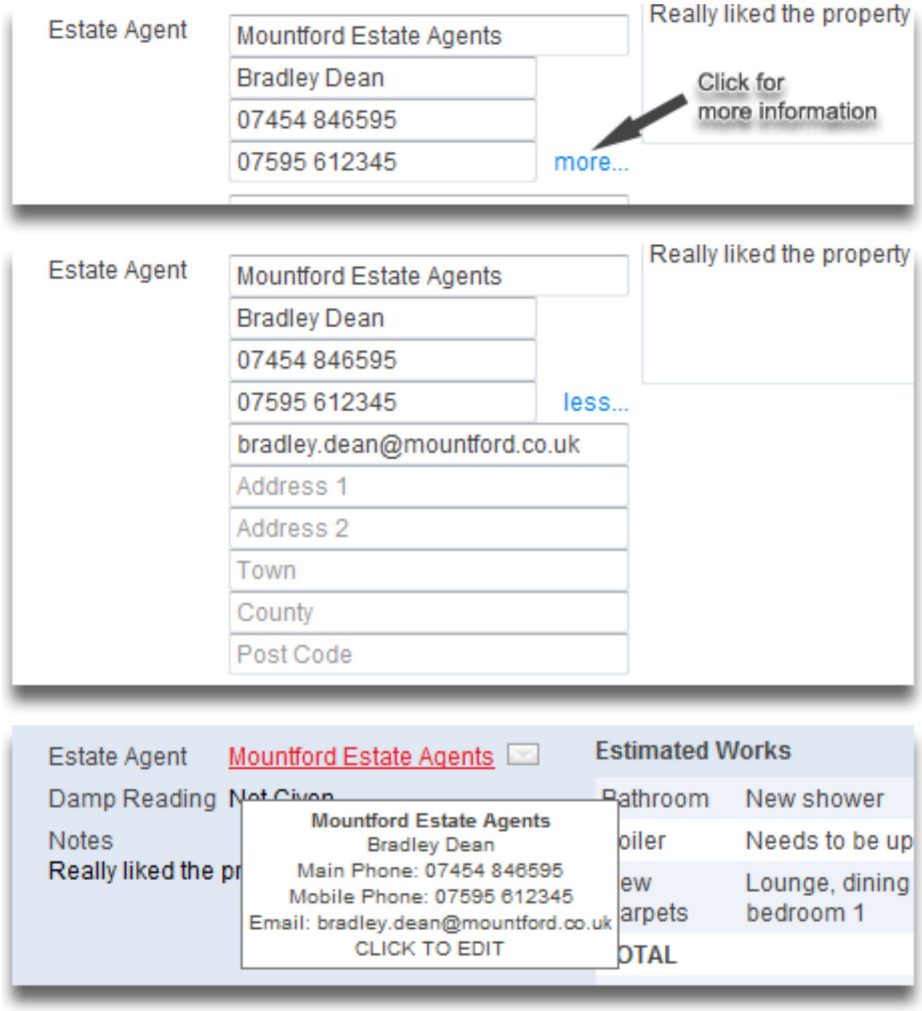
When you enter contact information into the software your contact is saved centrally which means when you come to enter the same contact again later on, the software will automatically prompt you to select the existing contact.

You can enter and view more information relating to a contact by clicking the more link next to the contact information.

This saves you an incredible amount of time as you only have to enter the first few letters of the contact and the rest will automatically be filled in for you.

You can access your contact information either from the property itself or via the global contact screen which gives you access to all of your contacts across your portfolio.

You can quickly access full contact details throughout the software by rolling your mouse over a contact name where you see it highlighted in blue.



About Documents

^ Top

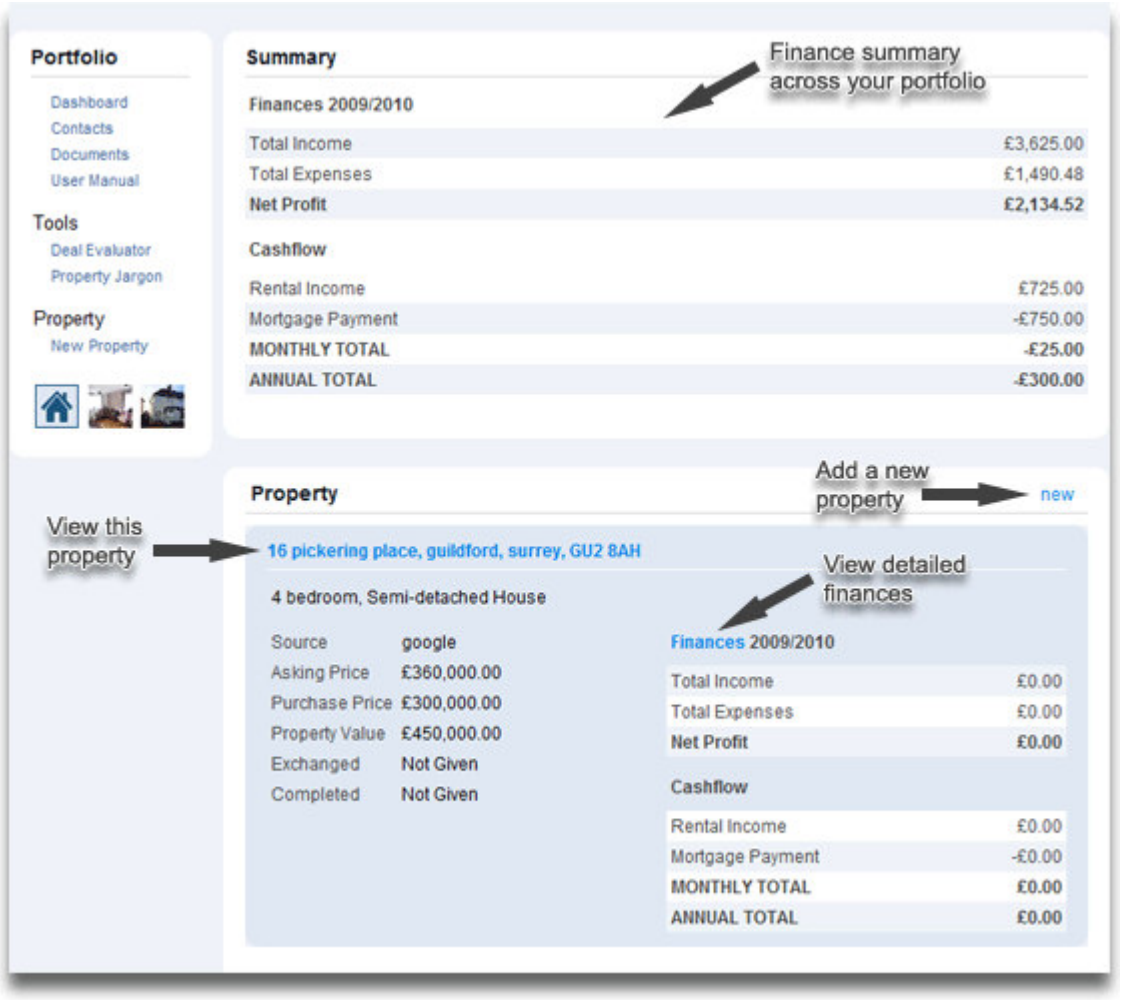
When you add a document to a property it is saved centrally which means you can quickly find documents related to your property from the property details or across your portfolio from the global documents screen.

Quick Reference

^ Top

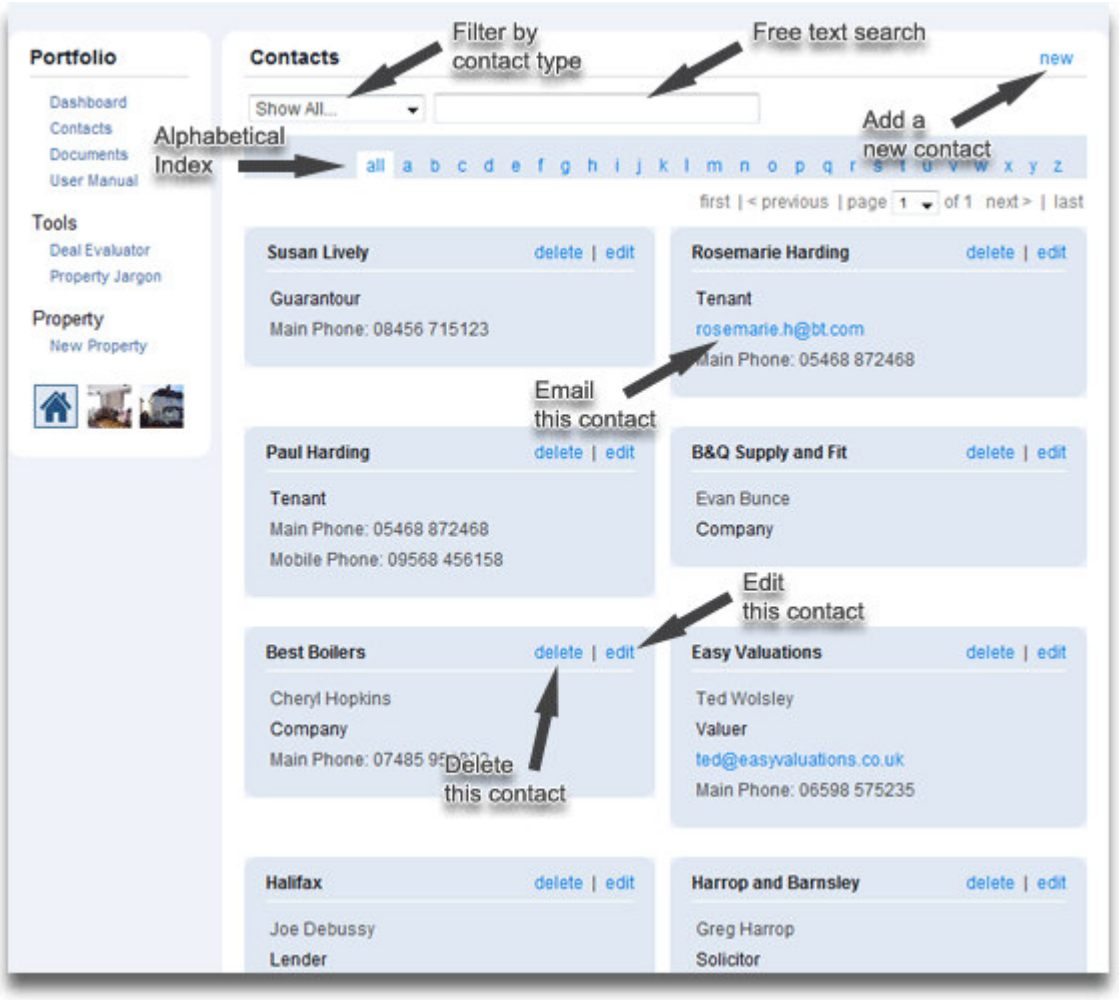
Dashboard

^ Top

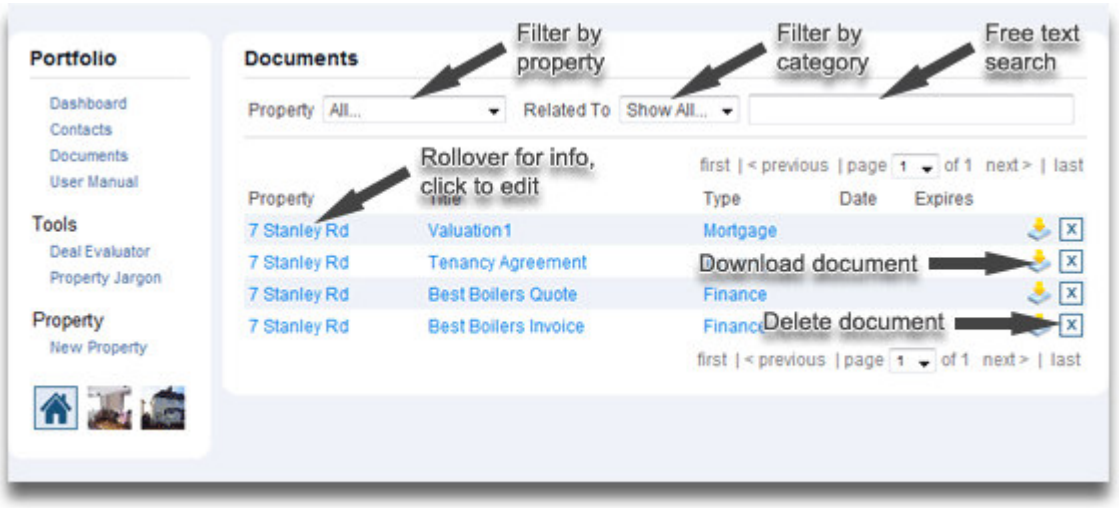


Global Contacts

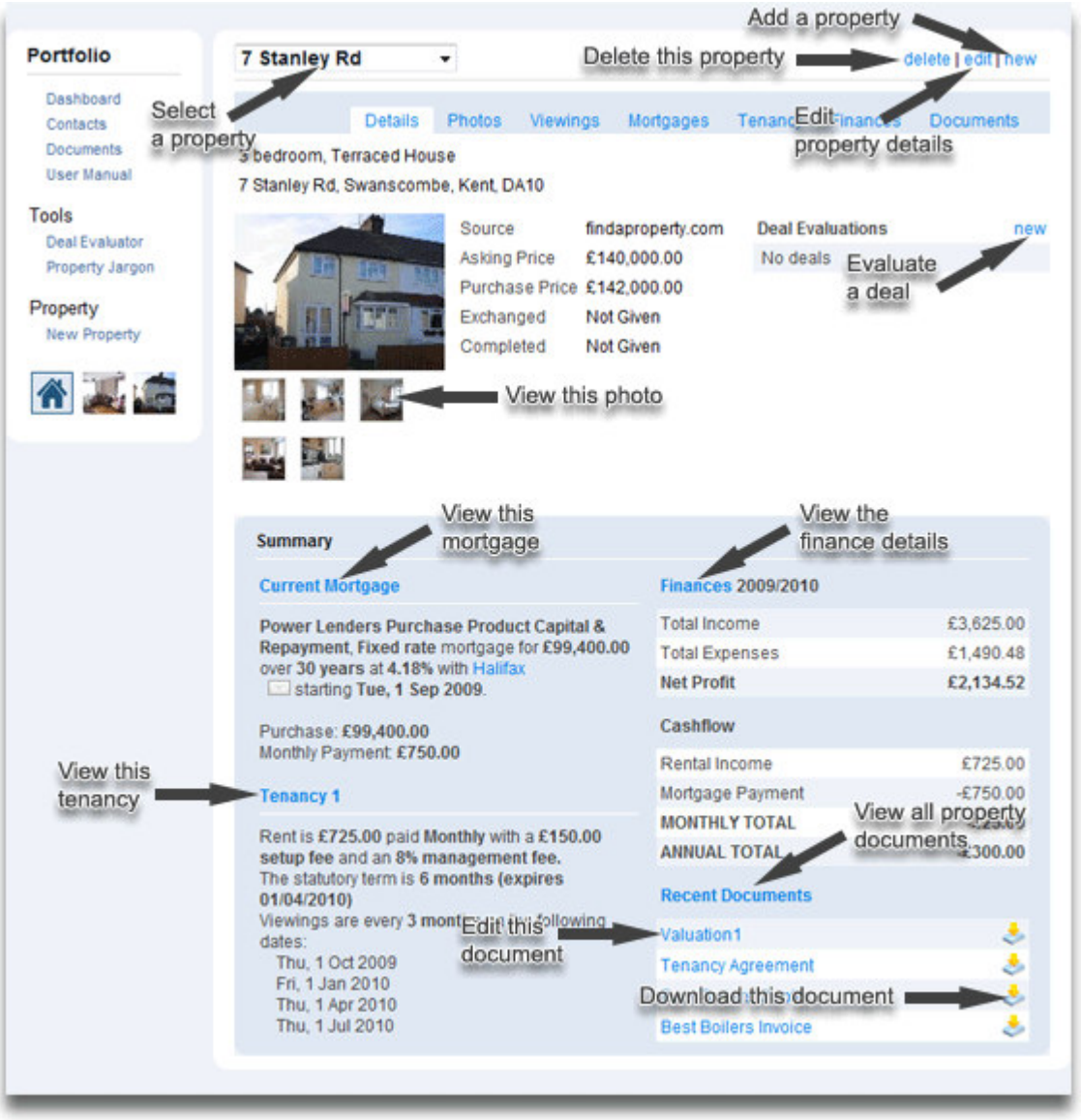
^ Top



Global Documents ^ Top

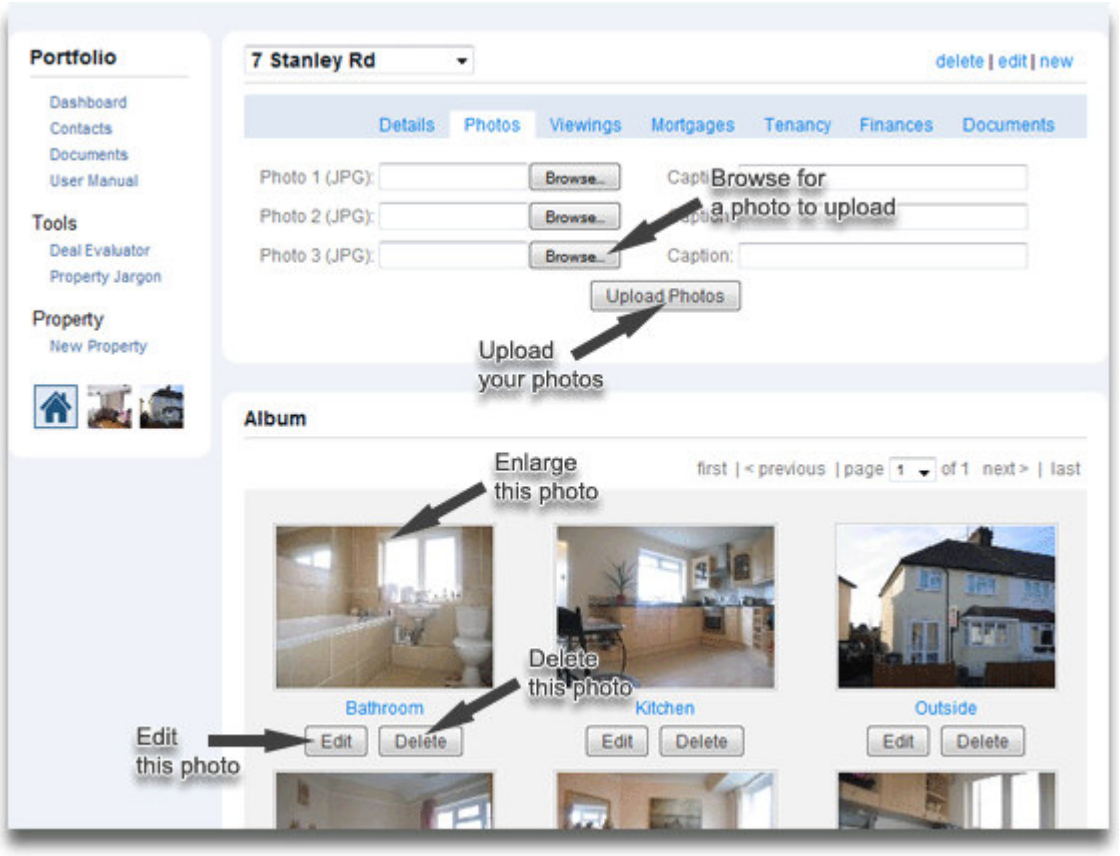


Property Details ^ Top

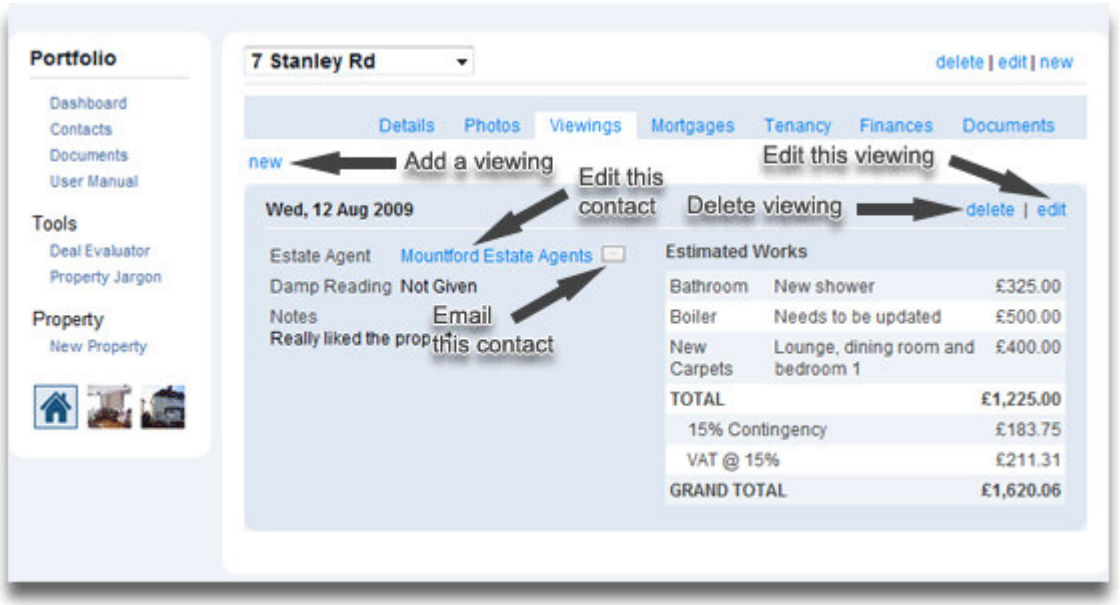

Add a property
Portfolio
7 Stanley Rd
Delete this property
delete | edit | new
Dashboard
Contacts
Documents
User Manual
Select a property
Details
Photos
Viewings
Mortgages
Tenancy
Finances
Documents
Edit property details
3 bedroom, Terraced House
7 Stanley Rd, Swanscombe, Kent, DA10
Tools
Deal Evaluator
Property Jargon
Property
New Property
Source findaproperty.com
Asking Price £140,000.00
Purchase Price £142,000.00
Exchanged Not Given
Completed Not Given
Deal Evaluations
new
No deals
Evaluate a deal
View this photo
Summary
View this mortgage
View the finance details
Current Mortgage
Finances 2009/2010
Power Lenders Purchase Product Capital & Repayment, Fixed rate mortgage for £99,400.00 over 30 years at 4.18% with Halifax
starting Tue, 1 Sep 2009.
Purchase: £99,400.00
Monthly Payment: £750.00
Total Income £3,625.00
Total Expenses £1,490.48
Net Profit £2,134.52
Cashflow
Rental Income £725.00
Mortgage Payment -£750.00
MONTHLY TOTAL
ANNUAL TOTAL £300.00
View this tenancy
Tenancy 1
View all property documents
Rent is £725.00 paid Monthly with a £150.00 setup fee and an 8% management fee.
The statutory term is 6 months (expires 01/04/2010)
Viewings are every 3 months on the following dates:
Thu, 1 Oct 2009
Fri, 1 Jan 2010
Thu, 1 Apr 2010
Thu, 1 Jul 2010
Recent Documents
Edit this document
Valuation1
Tenancy Agreement
Download this document
Best Boilers Invoice

Photos

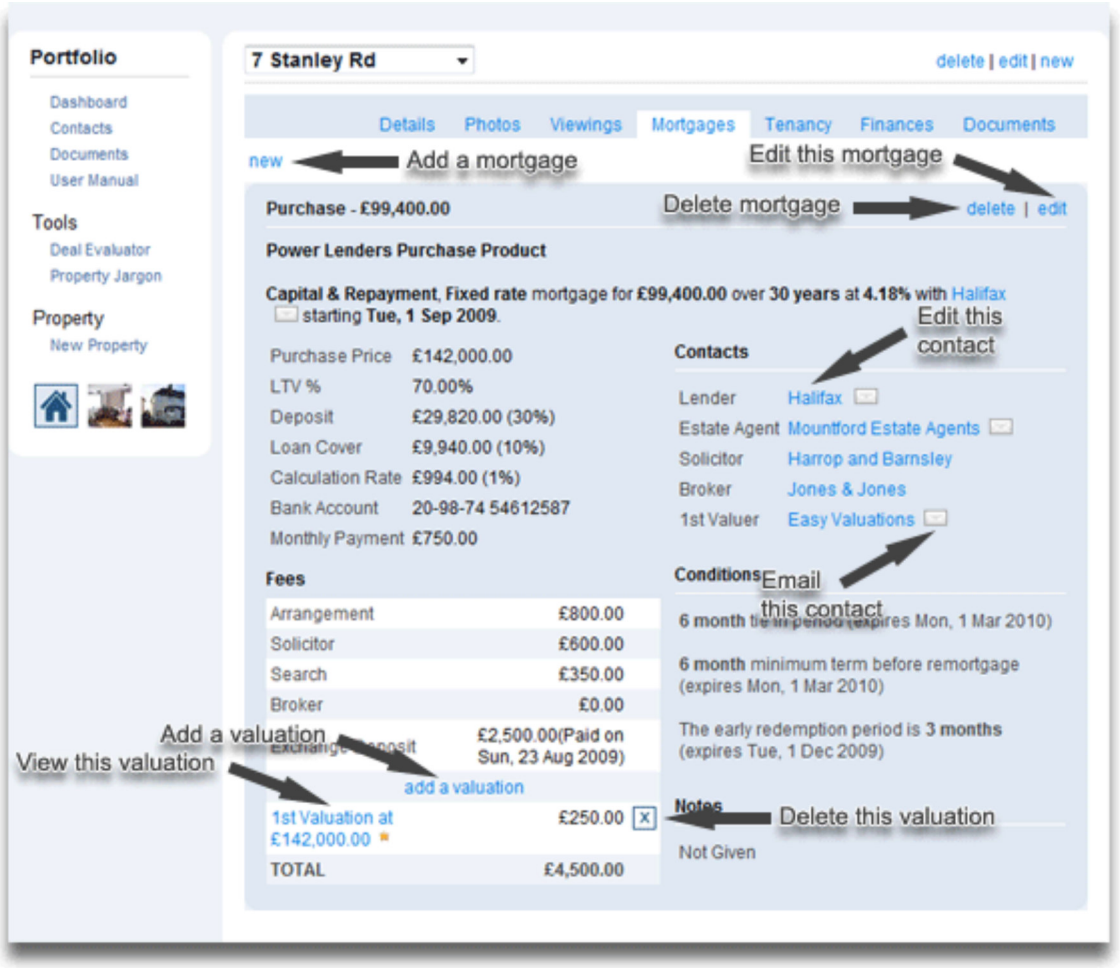
^ Top



Viewings ^ Top



Mortgages ^ Top


Portfolio
Dashboard
Contacts
Documents
User Manual
Tools
Deal Evaluator
Property Jargon
Property
New Property
7 Stanley Rd
delete | edit | new
Details Photos Viewings Mortgages Tenancy Finances Documents
new
Add a mortgage
Edit this mortgage
Delete mortgage
delete | edit
Purchase - £99,400.00
Power Lenders Purchase Product
Capital & Repayment, Fixed rate mortgage for £99,400.00 over 30 years at 4.18% with Halifax starting Tue, 1 Sep 2009.
Purchase Price £142,000.00
LTV % 70.00%
Deposit £29,820.00 (30%)
Loan Cover £9,940.00 (10%)
Calculation Rate £994.00 (1%)
Bank Account 20-98-74 54612587
Monthly Payment £750.00
Contacts
Edit this contact
Lender Halifax
Estate Agent Mountford Estate Agents
Solicitor Harrop and Barnsley
Broker Jones & Jones
1st Valuer Easy Valuations
Email this contact
Fees
Arrangement £800.00
Solicitor £600.00
Search £350.00
Broker £0.00
£2,500.00(Paid on Sun, 23 Aug 2009)
Add a valuation
View this valuation
add a valuation
1st Valuation at £142,000.00 £250.00
TOTAL £4,500.00
Conditions
6 month tie in period (expires Mon, 1 Mar 2010)
6 month minimum term before remortgage (expires Mon, 1 Mar 2010)
The early redemption period is 3 months (expires Tue, 1 Dec 2009)
Notes
Delete this valuation
Not Given

Tenancy

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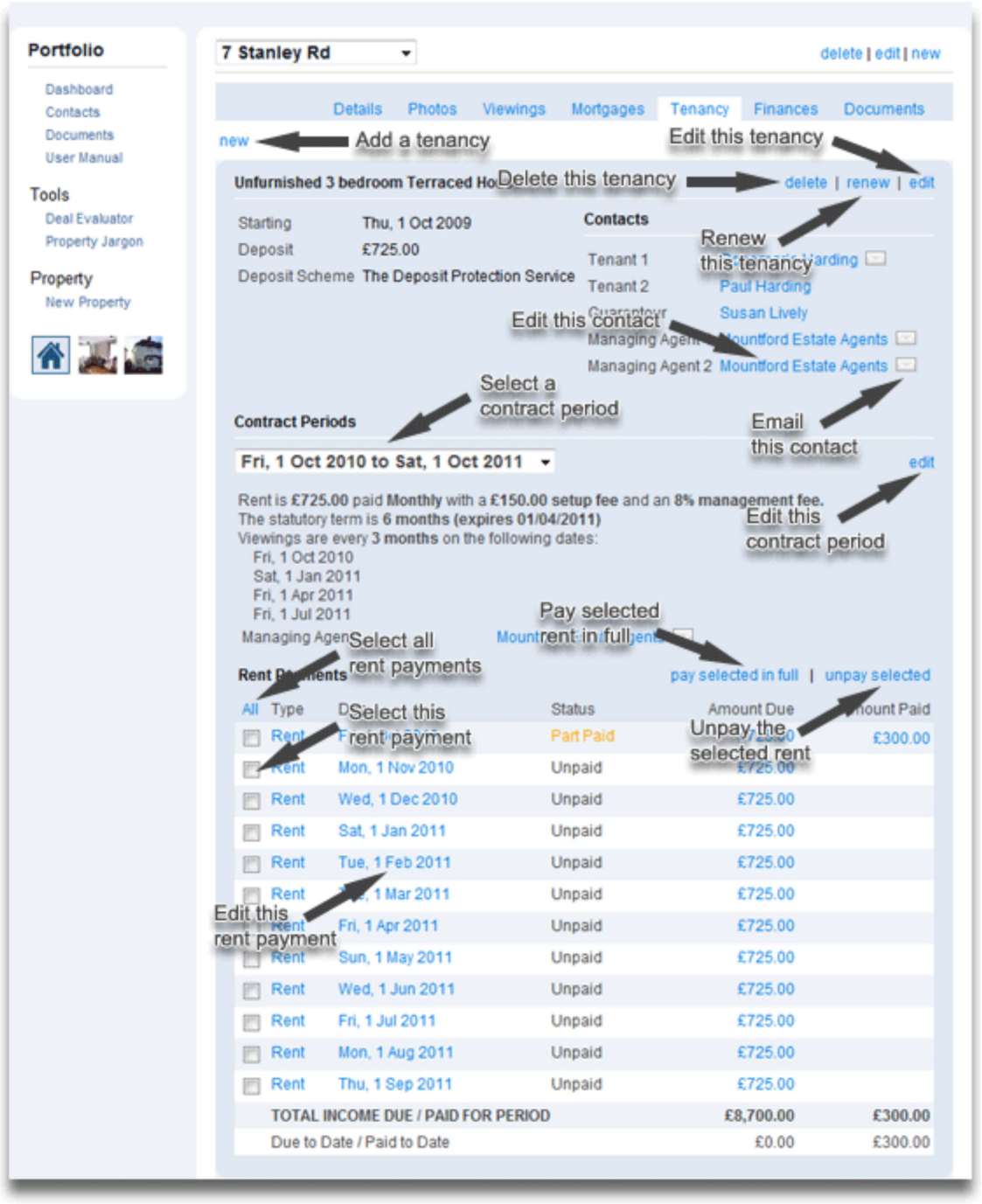
Portfolio
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Tools
Deal Evaluator
Property Jargon
Property
New Property
7 Stanley Rd
delete | edit | new
Details Photos Viewings Mortgages Tenancy Finances Documents
new
Add a tenancy
Edit this tenancy
Delete this tenancy
Unfurnished 3 bedroom Terraced Ho
delete | renew | edit
Starting Thu, 1 Oct 2009
Deposit £725.00
Deposit Scheme The Deposit Protection Service
Contacts
Tenant 1
Tenant 2 Paul Harding
Susan Lively
Renew this tenancy
Edit this contact
Managing Agent 2 Mountford Estate Agents
Select a contract period
Email this contact
Contract Periods
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
edit
Rent is £725.00 paid Monthly with a £150.00 setup fee and an 8% management fee.
The statutory term is 6 months (expires 01/04/2011)
Viewings are every 3 months on the following dates:
Fri, 1 Oct 2010
Sat, 1 Jan 2011
Fri, 1 Apr 2011
Fri, 1 Jul 2011
Edit this contract period
Pay selected rent in full
Select all rent payments
pay selected in full | unpay selected
All Type Status Amount Due Amount Paid
Rent Part Paid £300.00
Select this rent payment
Unpay the selected rent
Rent Mon, 1 Nov 2010 Unpaid £725.00
Rent Wed, 1 Dec 2010 Unpaid £725.00
Rent Sat, 1 Jan 2011 Unpaid £725.00
Rent Tue, 1 Feb 2011 Unpaid £725.00
Rent Unpaid £725.00
Edit this rent payment
Rent Fri, 1 Apr 2011 Unpaid £725.00
Rent Sun, 1 May 2011 Unpaid £725.00
Rent Wed, 1 Jun 2011 Unpaid £725.00
Rent Fri, 1 Jul 2011 Unpaid £725.00
Rent Mon, 1 Aug 2011 Unpaid £725.00
Rent Thu, 1 Sep 2011 Unpaid £725.00
TOTAL INCOME DUE / PAID FOR PERIOD £8,700.00 £300.00
Due to Date / Paid to Date £0.00 £300.00

Finances

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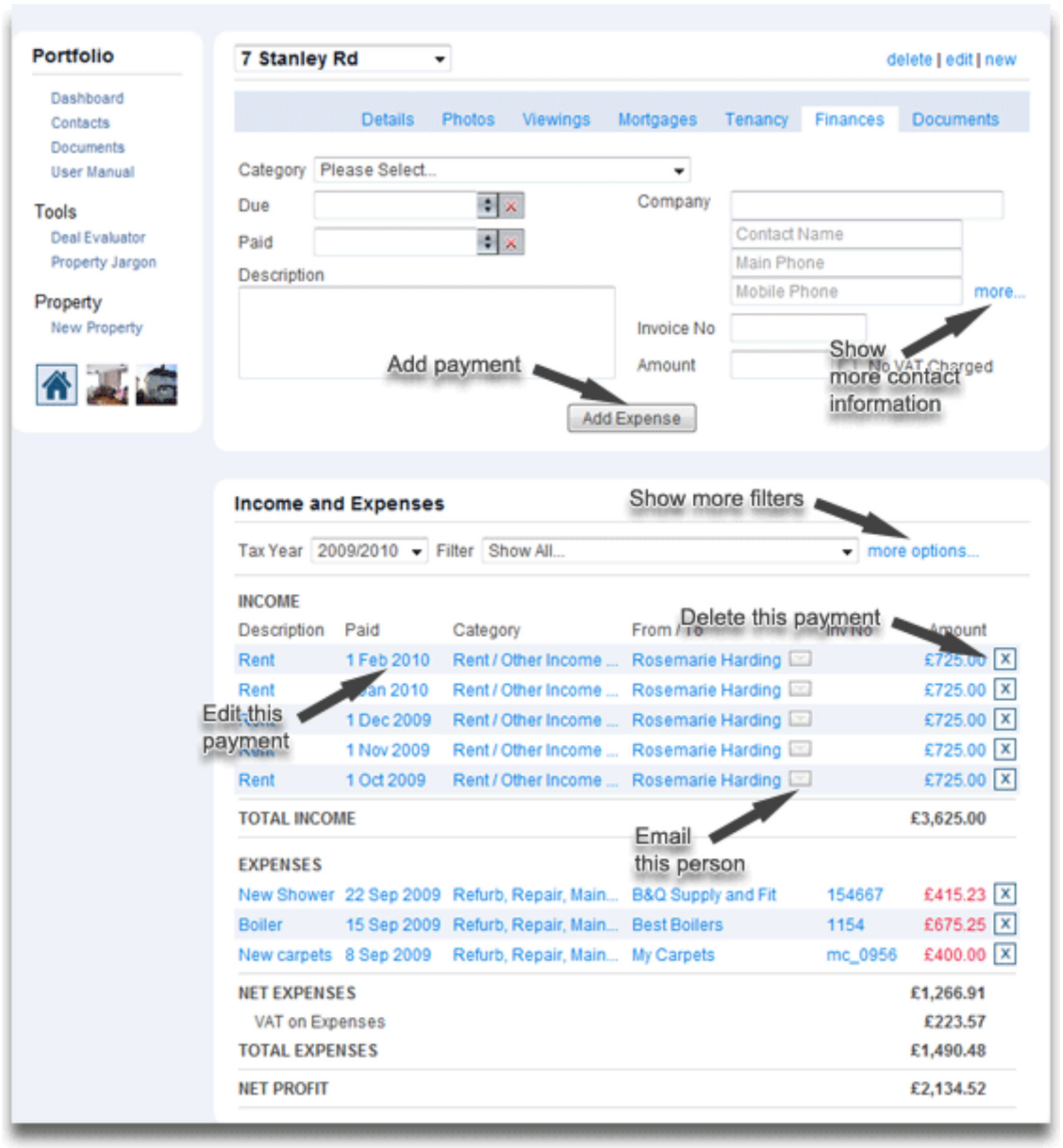
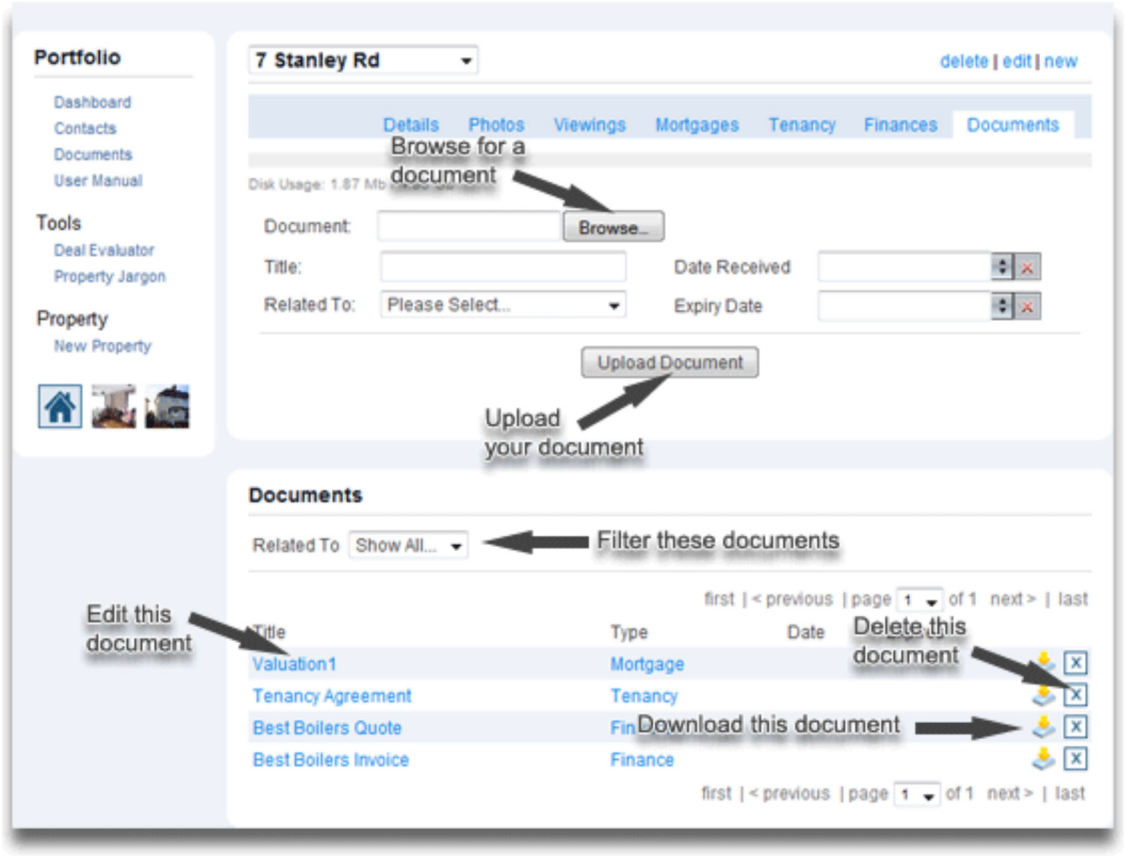


Documents

^ Top



Deal Evaluator

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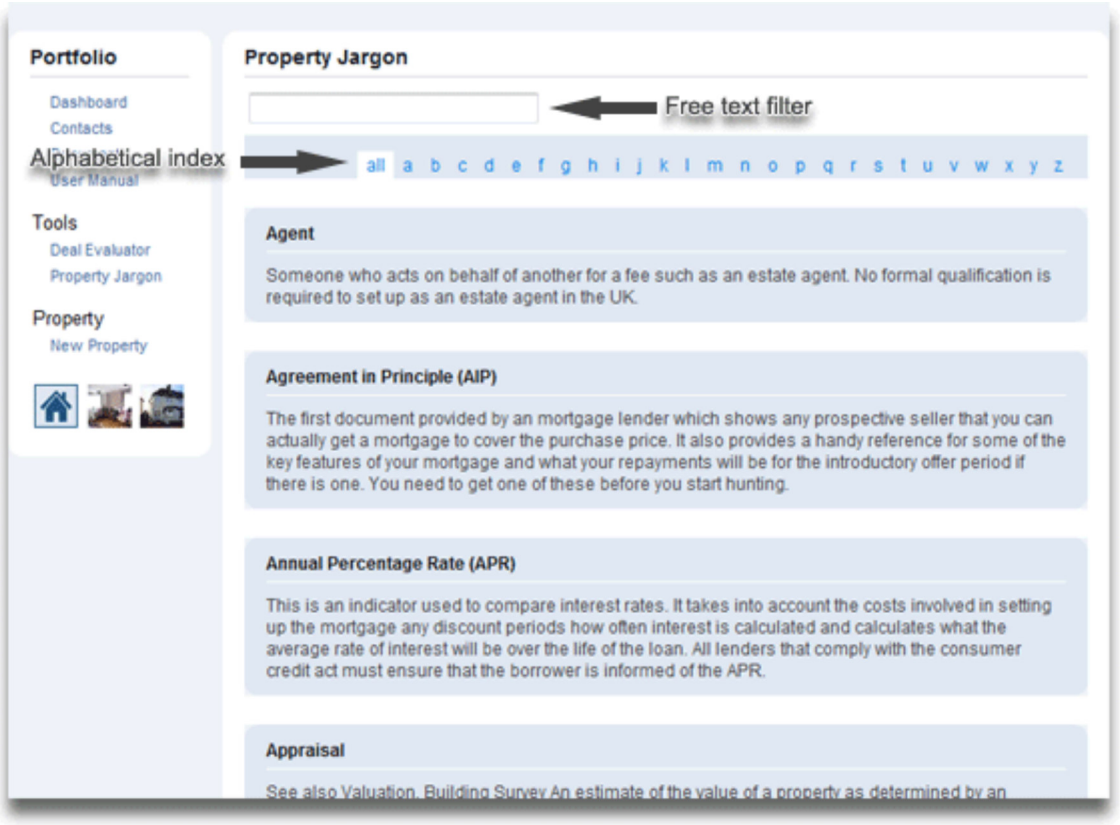
Property Jargon

^ Top


Portfolio
Dashboard
Contacts
User Manual
Tools
Deal Evaluator
Property Jargon
Property
New Property
Property Jargon
Free text filter
Alphabetical index
all a b c d e f g h i j k l m n o p q r s t u v w x y z
Agent
Someone who acts on behalf of another for a fee such as an estate agent. No formal qualification is required to set up as an estate agent in the UK.
Agreement in Principle (AIP)
The first document provided by an mortgage lender which shows any prospective seller that you can actually get a mortgage to cover the purchase price. It also provides a handy reference for some of the key features of your mortgage and what your repayments will be for the introductory offer period if there is one. You need to get one of these before you start hunting.
Annual Percentage Rate (APR)
This is an indicator used to compare interest rates. It takes into account the costs involved in setting up the mortgage any discount periods how often interest is calculated and calculates what the average rate of interest will be over the life of the loan. All lenders that comply with the consumer credit act must ensure that the borrower is informed of the APR.
Appraisal
See also Valuation, Building Survey An estimate of the value of a property as determined by an

Testing a Deal

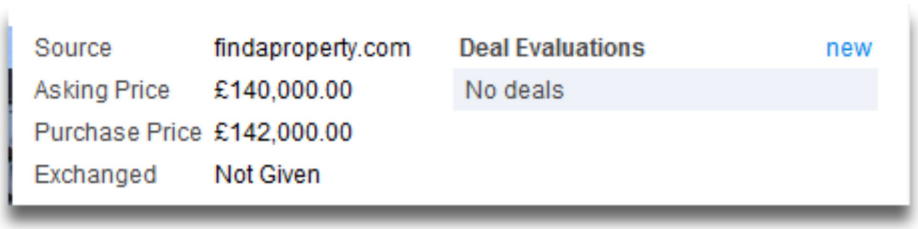
^ Top

The deal evaluator allows you to test property deals either by adding the deal to an existing property or by creating an ad-hoc evaluation for property that is not yet in your portoflio.

To do an ad-hoc deal evaluation go to the "Deal Evaluator" screen, enter a reference and fill in the fields. Click "Save" when you are happy with your deal.

To evaluate a deal against an existing property in your portfolio, from the "Property Detail" screen click the "new" link from the "Deal Evaluations" section.

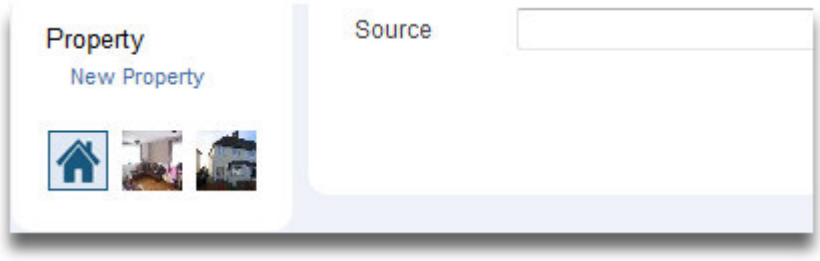
To attach an existing deal to an existing property, select the property, click the "new" link from the "Deal Evaluations" section and then select the deal you want to attach from the deal evaluations selector. Click "Save" to attach the deal to the property.

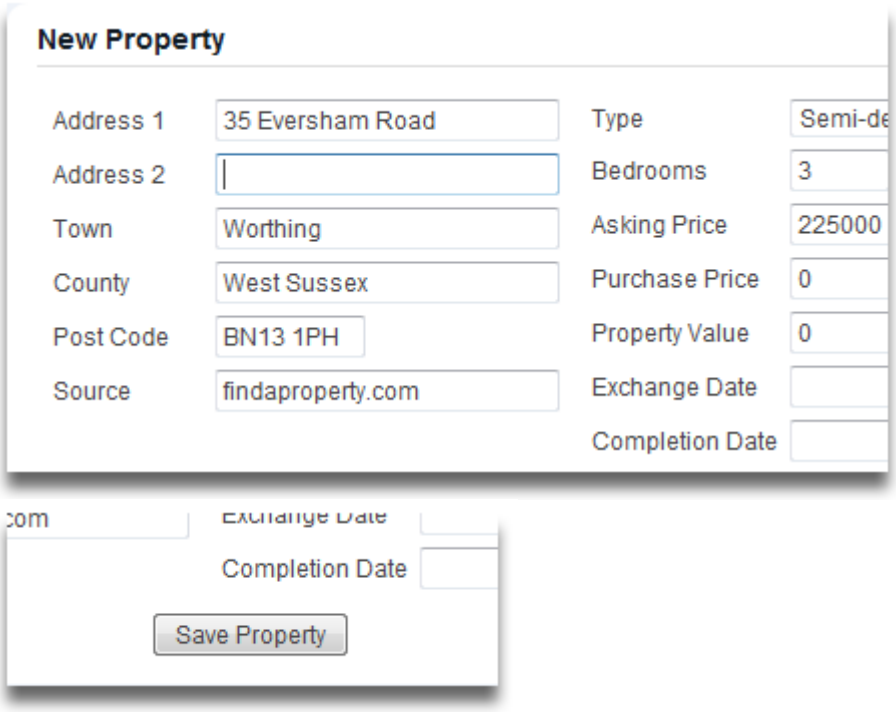


Adding a Property

^ Top

To add a property, click the "New Property" link, enter the property details and click "Save Property" to add your new property to your portfolio.

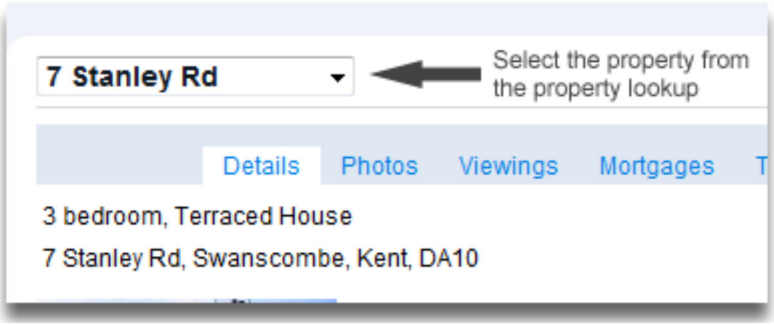


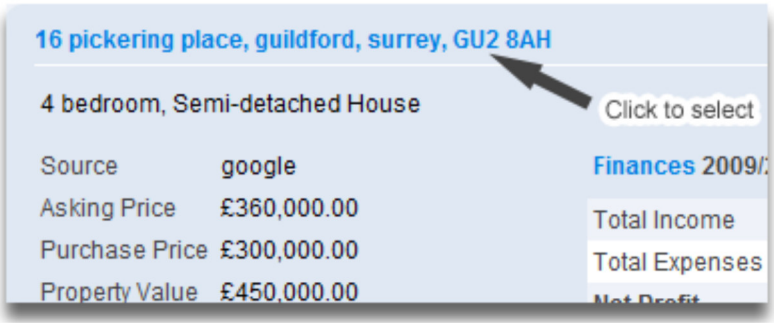


Selecting a Property

^ Top

Select a property by clicking it's image in the left menu, choosing it from the property selector or anywhere in the software where you see the property address as a link:



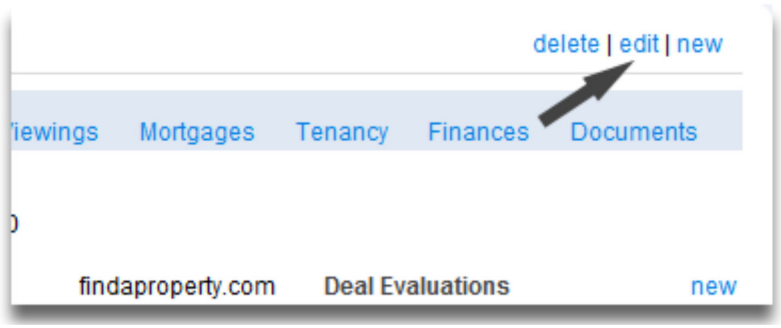


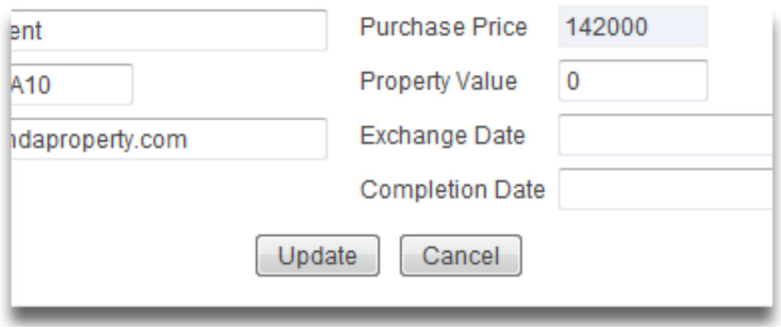
Editing a Property

^ Top

Select the property you wish to edit and simply click the "edit" link to edit the property details.

After you're finished editing, click the "Update" button to save your changes.





About Photos

^ Top

You can store photos against each property you add to the software. This is useful for before and after photos of a refurbishment, for recording the condition of the property before and after a tenant moves in and for planning works.

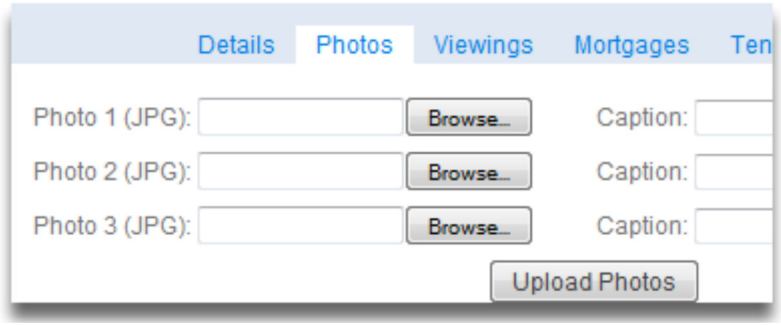
Adding Photos

^ Top

Select the property and choose the "Photos" tab.

To add photos simply click the "Browse..." button and find the photo on your hard drive. If you like you can also enter a caption for your photo. You may upload up to 3 photos at a time.

When you have selected the photos you want then simply click "Upload Photos" to add your photos to the property.

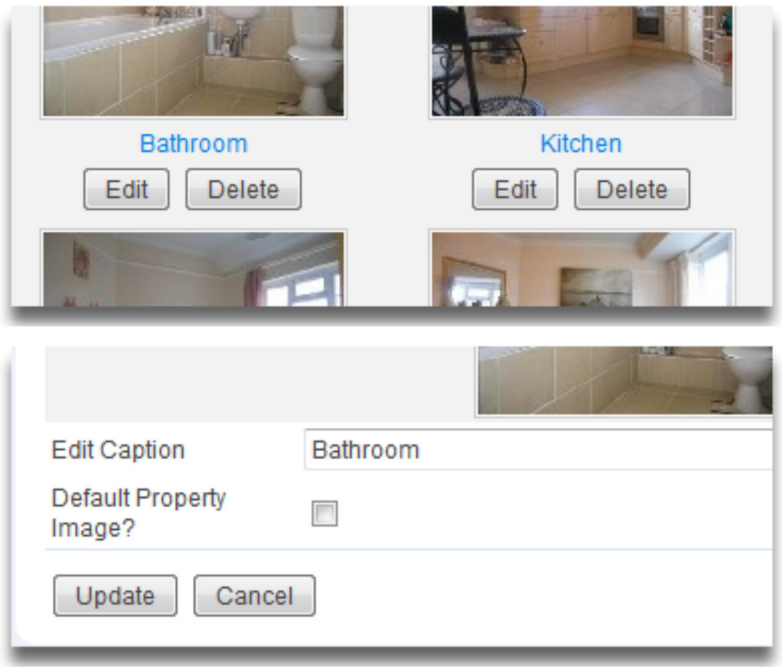


Editing Photos

^ Top

Select the property and choose the "Photos" tab.

To rename a photo click the "Edit" button under the photo you wish to rename, fill in the "Edit Caption" field with the new photo name and click the "Update" button to save your changes.



Setting the Default Photo

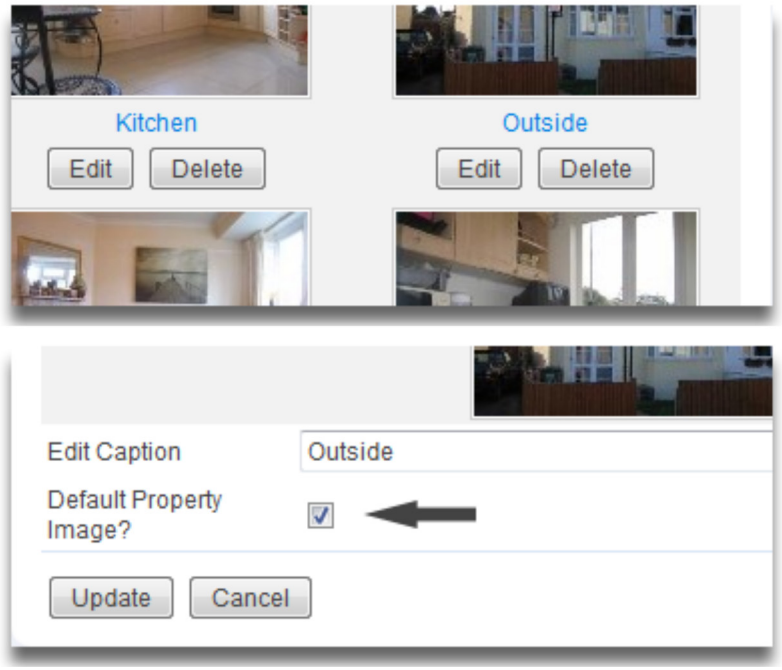
^ Top

You can set the default photo you would like the software to use when displaying your property.

This is the photo that appears in the left hand menu, the property detail screen and also them main photo you will see when you view the property elsewhere in the software.

Select the property and choose the "Photos" tab.

Edit the photo you wish to set as the default, tick the "Default Property Image" checkbox and click the "Update" button to save your changes.



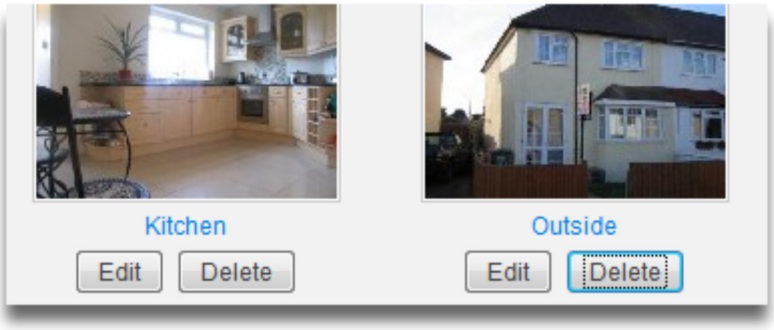
Deleting Photos

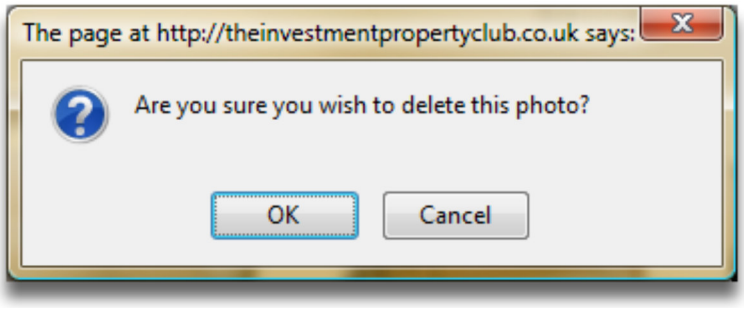
^ Top

Select the property and choose the "Photos" tab.

To delete a photo simply click the "Delete" button underneath the photo you wish to remove.

The software will ask if you are sure you wish to delete the photo, click "Ok" to confirm the deletion.





About Viewings

^ Top

You can store your property viewings and estimated works against your property. This is useful for planning a refurbishment, keeping track of works required and carried out over the lifetime of the property and recording periodic viewings during the course of a tenancy.

Adding a Viewing

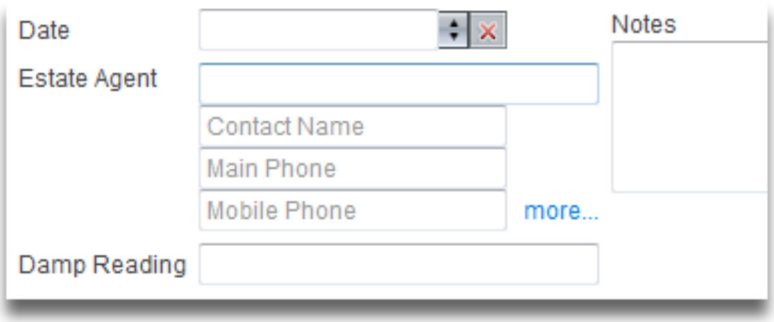
^ Top

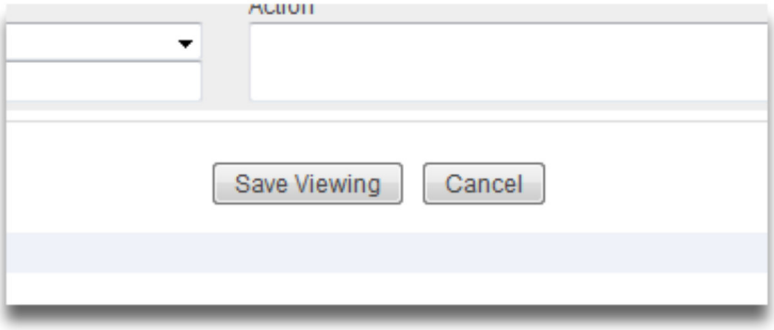
Select the property and choose the "Viewings" tab.

Click the "new" link to create a new property viewing.

Select the date of the viewing and enter any other details. When you are done, click the "Save Viewing" button to save the viewing.

You can also record any works required against the viewing (see the estimated works section).





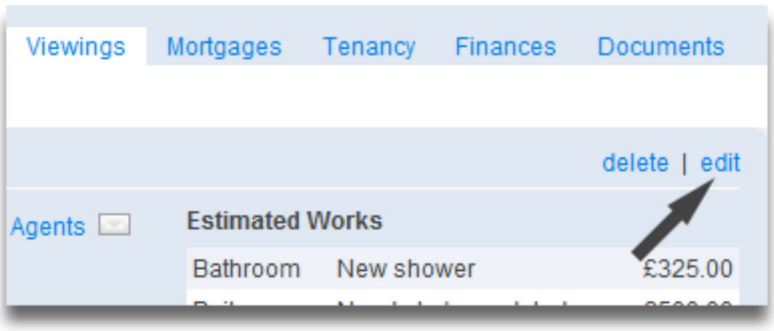
Editing a Viewing

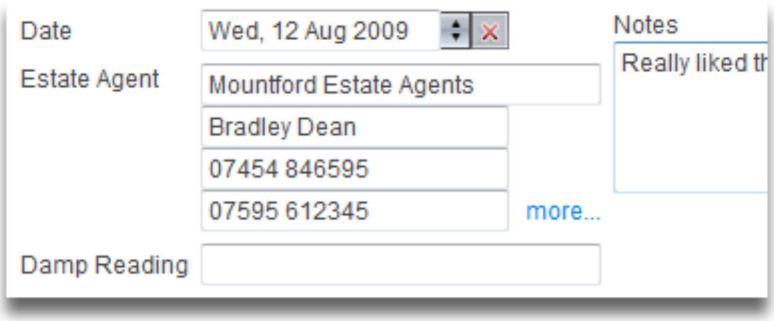
^ Top

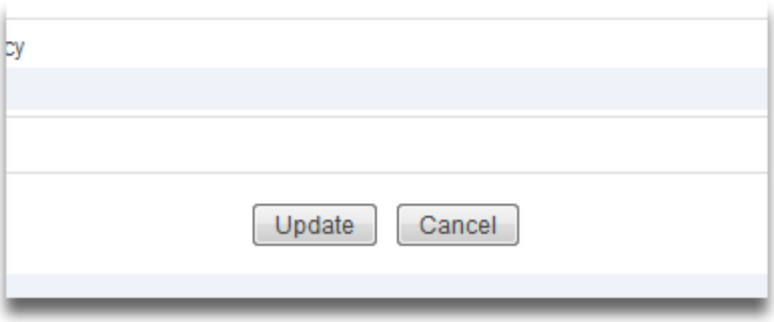
Select the property and choose the "Viewings" tab.

Click the "edit" link on the viewing you wish to edit.

Edit the viewing details and when you are done, click the "Update" button to save your changes.







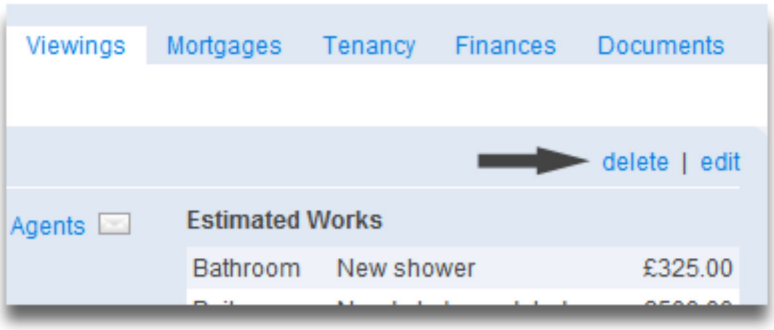
Deleting a Viewing

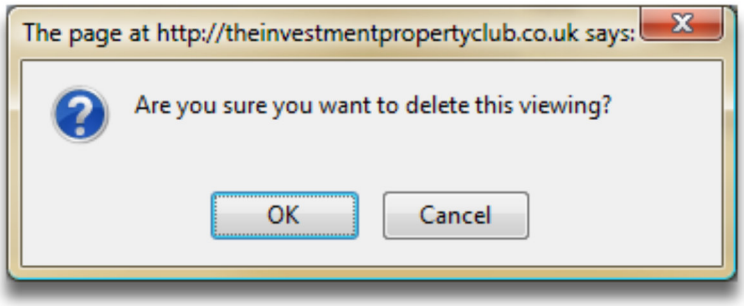
^ Top

Select the property and choose the "Viewings" tab.

Click the "delete" link on the viewing you wish to remove.

The software will ask you to confirm the deletion, click "Ok" to remove it.





Adding Estimated Works

^ Top

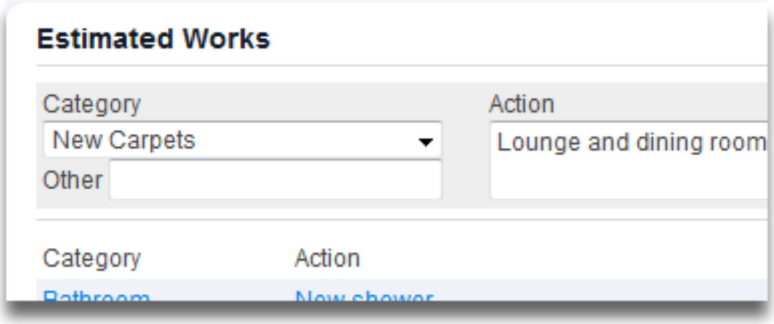
Estimated works can be recorded against a property viewing

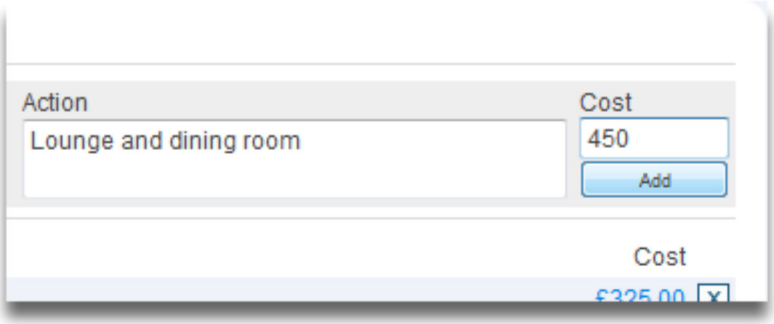
Select the property and choose the "Viewings" tab.

Create a new viewing (see "Adding a Viewing") or edit an existing one (see "Editing a Viewing").

In the "Estimated Works" section select the category, action and estimated cost of your works item and then click the "Add" button to add the item to your works list.

You can add as many items as you wish and the software will total the items for you and also include a contingency of 15% and calculate the VAT.





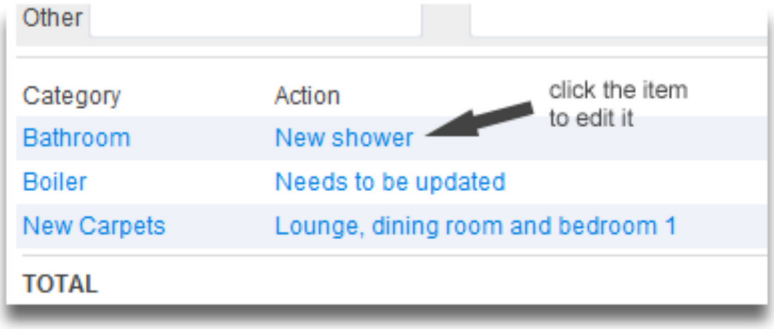
Editing Estimated Works

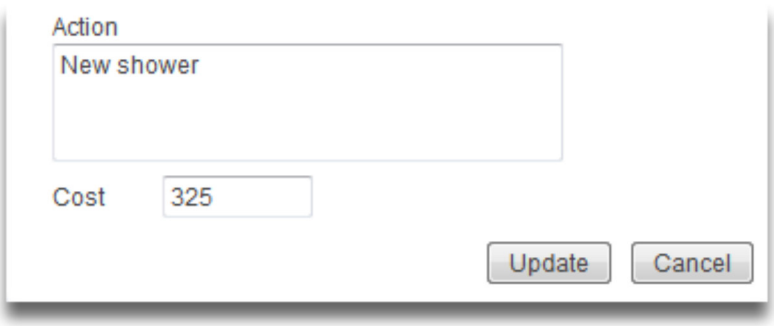
^ Top

Select the property and choose the "Viewings" tab.

Edit the viewing that has the estimated works you wish to alter.

To edit a works item simply click it, change the details and then click the "Update" button to save your changes.





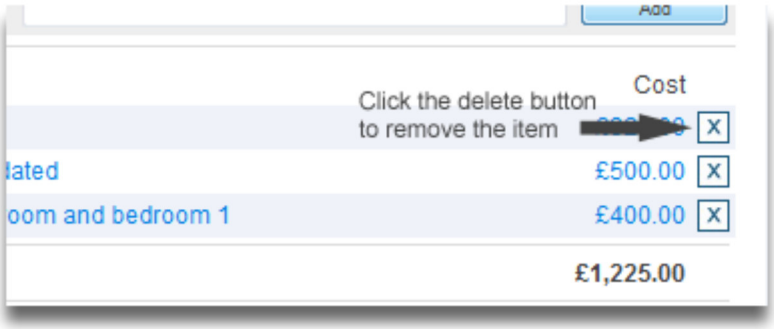
Deleting Estimated Works

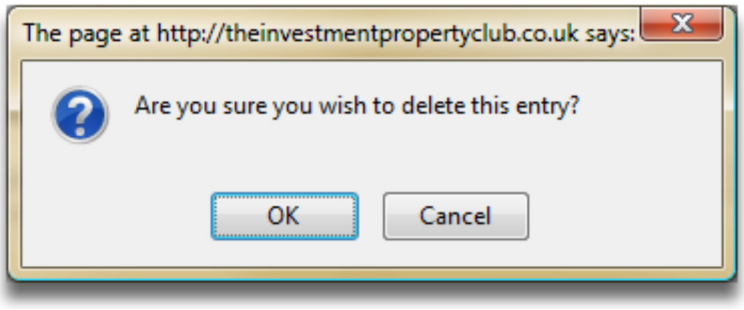
^ Top

Select the property and choose the "Viewings" tab.

Edit the viewing that has the estimated works you wish to alter.

To delete an estimated works item simply click the delete button to the right of the item in the list and then confirm the deletion when the software prompts you.





About Mortgages

^ Top

You can keep a record of the mortgages you have against your property. This is useful for keeping track of your mortgage product, broker, solicitor, estate agent and any mortgage fees.

You can also keep a history of your property valuations against the mortgage which is useful if you have received multiple valuations for the same property.

Adding a Mortgage

^ Top

Select the property and choose the "Mortgages" tab.

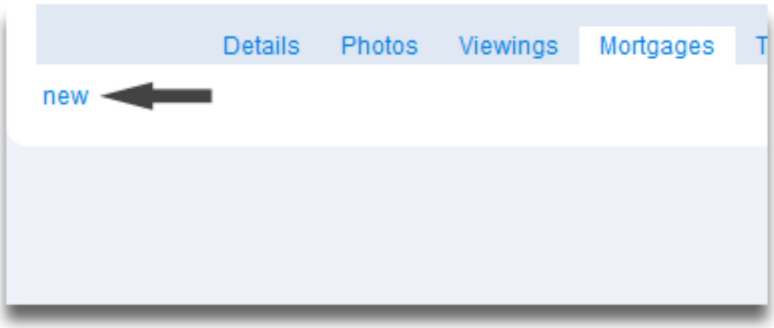
Click the "new" link to create a new mortgage.

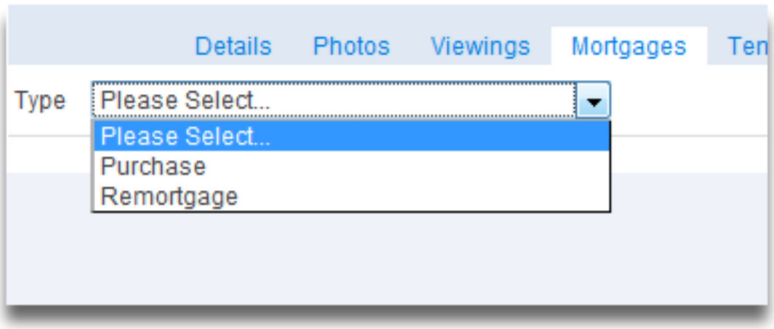
Select the type of mortgage that you would like to add. If you have already added a purchase mortgage to the property then the software will automatically set the mortgage type to "Remortgage" for you.

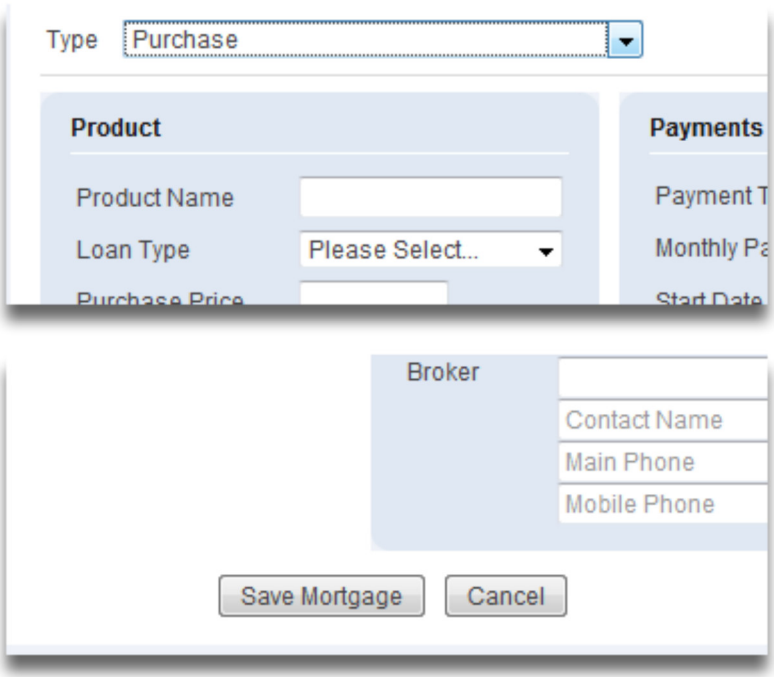
Enter the lender product details, conditions, payments and fees and contact information.

Note that you only need to enter a small amount of information in order to save your mortgage so you can store as little or as much data as you like.

Click the "Save Mortgage" button to save your mortgage.







Editing a Mortgage

^ Top

Select the property and choose the "Mortgages" tab.

Click the "edit" link on the mortgage you wish to edit.

Once you are finished editing your mortgage information simply click the "Save Mortgage" button to save your changes.

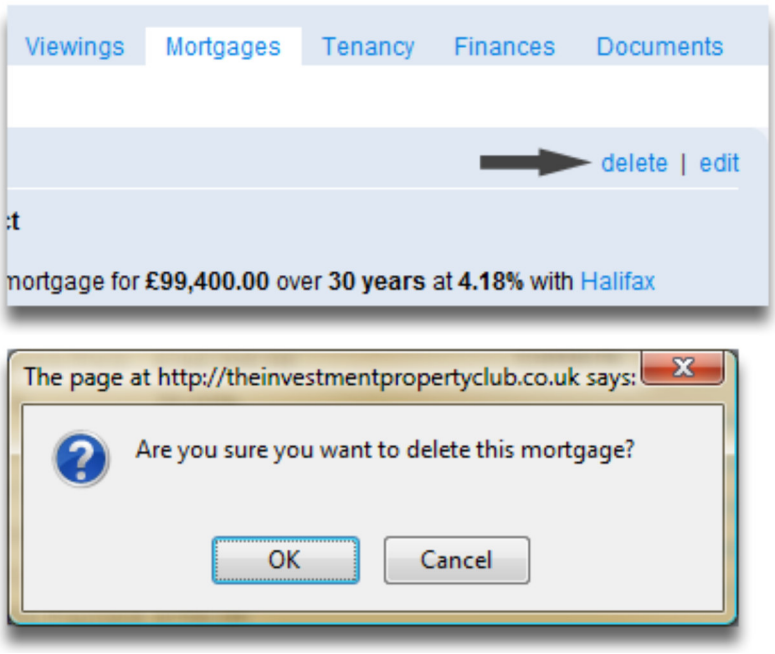
Deleting a Mortgage

^ Top

Select the property and choose the "Mortgages" tab.

Click the "delete" link on the mortgage you wish to remove.

The software will ask you to confirm the deletion, click "Ok" to remove the mortgage.



Adding a Valuation

^ Top

Select the property and choose the "Mortgages" tab.

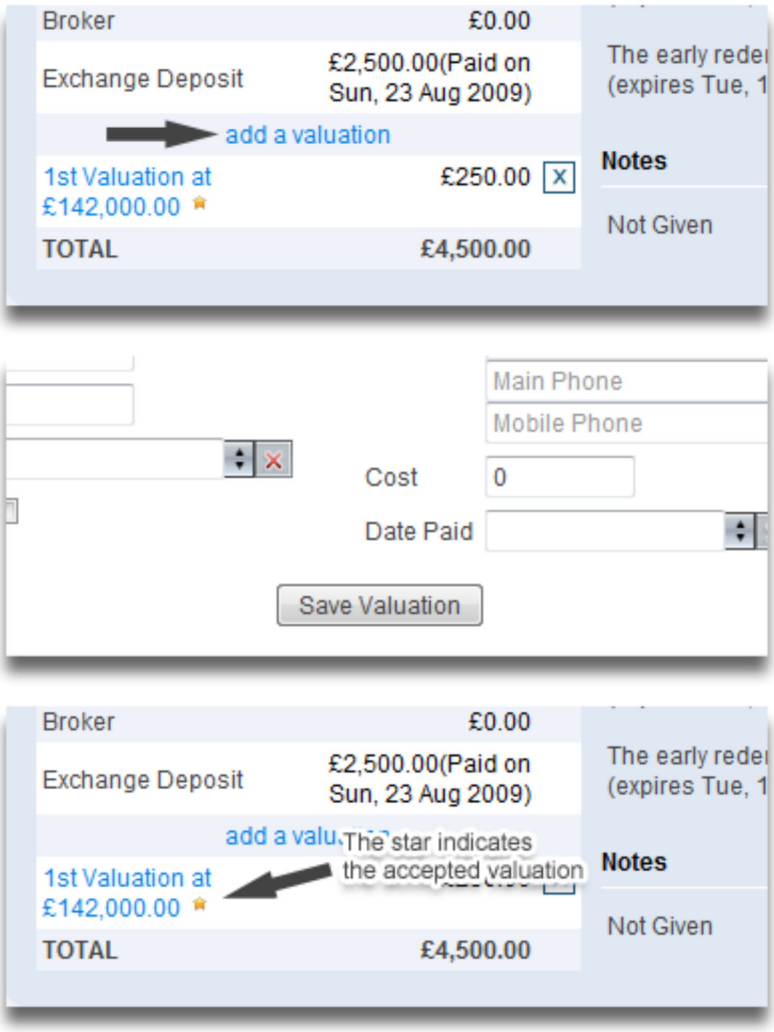
On the mortgage you have received the valuation for click the "add a valuation" link.

Enter the valuation information. The valuation date, valuation amount and the date you received the valuation are the only required fields although you can optionally enter the cost, valuer and the date you paid for the valuation and the software will reflect this on your mortgage.

if you wish to accept this valuation or this is the only valuation you are expecting on this property then you can tick the "Accepted" checkbox to automatically update the property value on the property details screen.

When have entered your valuation click the "Save Valuation" button to save your changes.

Note that the accepted valuation is indicated by a star icon on the mortgage information.



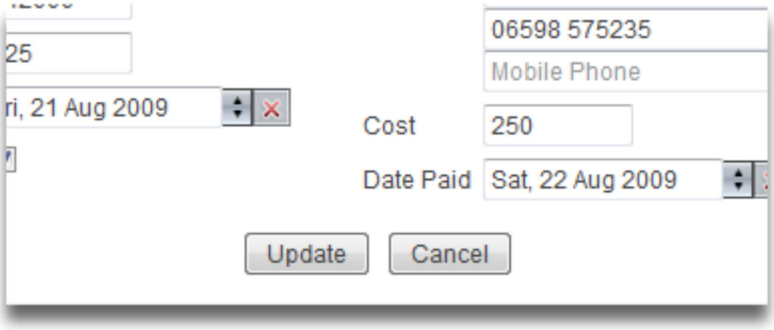
Editing a Valuation

^ Top

Select the property and choose the "Mortgages" tab.

On the mortgage, click the valuation you wish to edit.

When you have finished editing the details, simply click the "Update" button to save your changes.



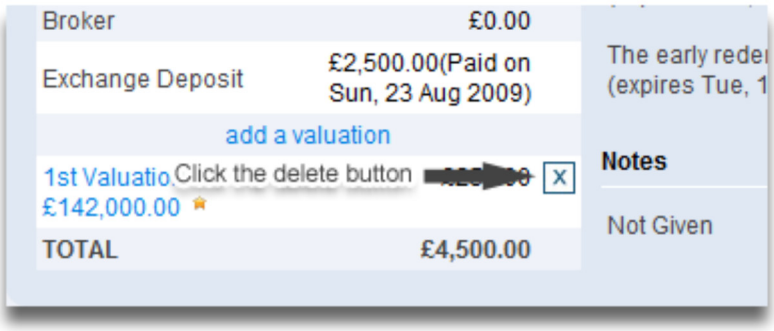
Deleting a Valuation

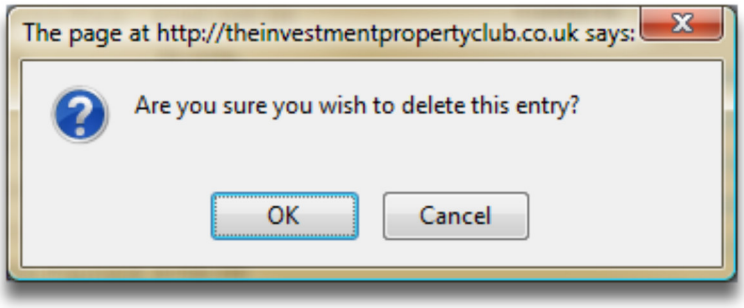
^ Top

Select the property and choose the "Mortgages" tab.

On the mortgage, click the "delete" button next to the valuation you wish to remove.

The software will ask you to confirm the deletion, click "Ok" to remove the valuation.





About Tenancies

^ Top

You can keep a record of the tenancies you have against your property. This is useful for keeping track of details of a tenancy, the tenants, the deposit, rent payments and contract periods for your tenancy.

You can also manage multiple concurrent tenancies against a single property.

Adding a Tenancy

^ Top

Select the property and choose the "Tenancy" tab.

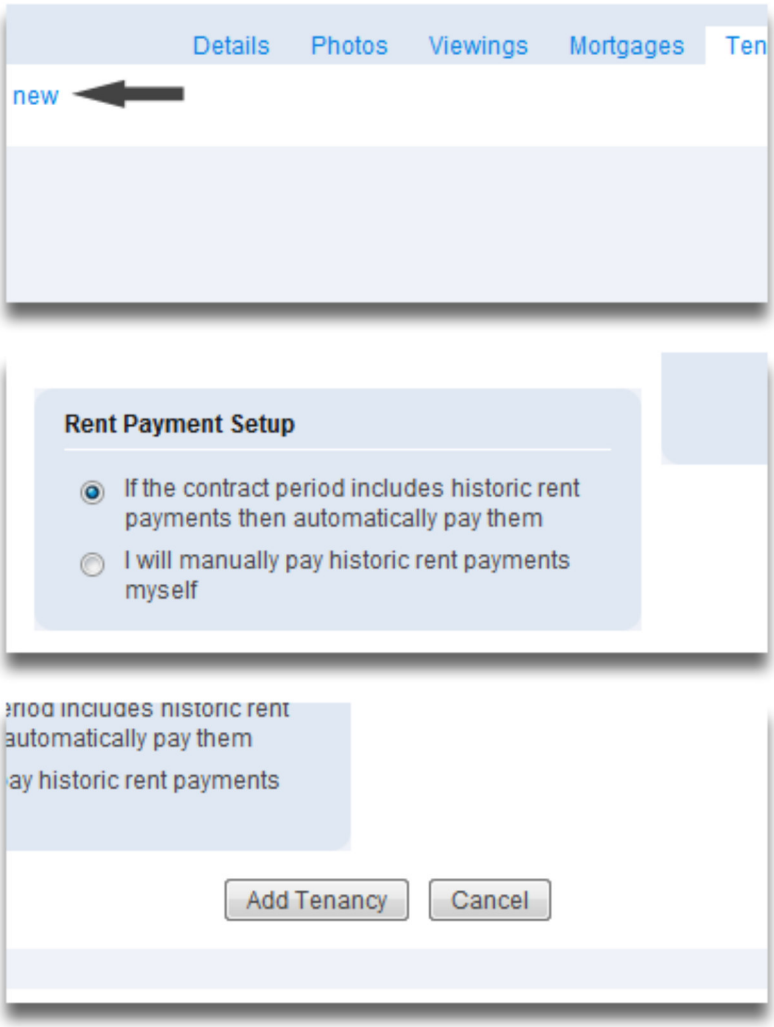
Click the "new" link to create a new tenancy.

Enter the details of your tenancy. The "Contract Period" describes the current term of the tenancy agreement you have with your tenant/s.

The "Rent Payment Setup" options allow you to automatically pay historic rent if you are setting up the tenancy retrospectively.

Note that you only need to enter a small amount of information in order to set up a tenancy and you can return later to fill in any missing details.

Click the "Add Tenancy" button to save your changes and setup your tenancy.



Editing a Tenancy

^ Top

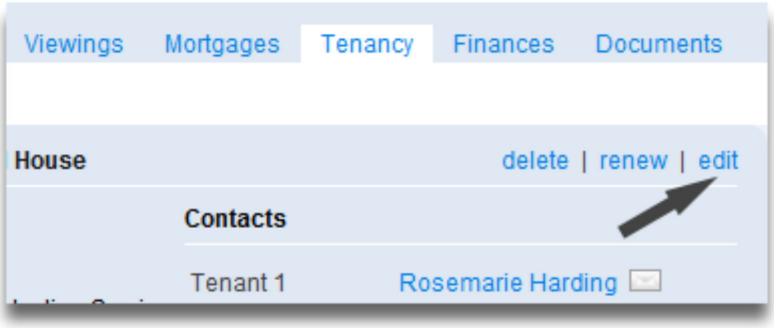
Select the property and choose the "Tenancy" tab.

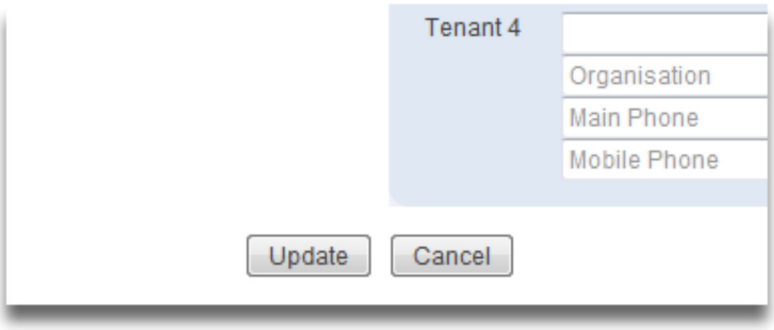
Click the "edit" link on the tenancy you wish to edit.

Change the tenancy information.

The "Contacts" section lists the tenancy contracts that exist for the selected tenancy (see "Editing Contract Periods" for more information).

When you are finished editing, click the "Update" button to save your changes.





Renewing a Tenancy

^ Top

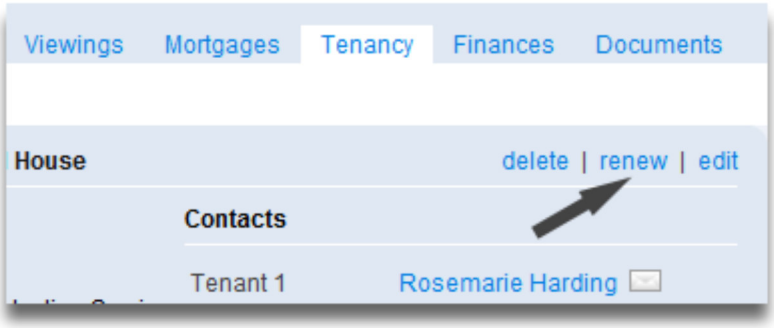
Select the property and choose the "Tenancy" tab.

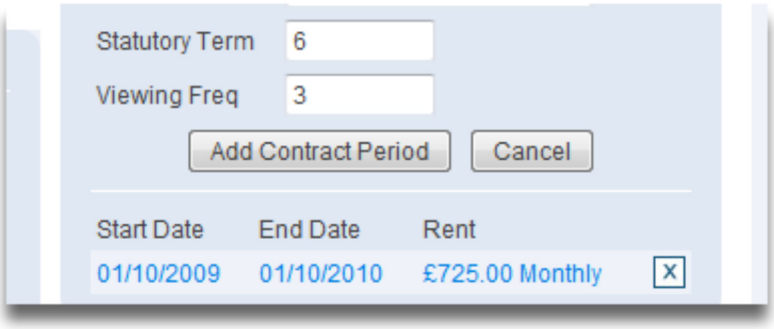
Click the "renew" link on the tenancy you wish to edit.

The tenancy screen will load and the software will automatically populate the new contract terms for you based on the previous contract period. You can now edit the contract information if the new contract term is different.

When you are happy with the details of your new contract period then simply click "Add Contract Period" to add the new contract period to the tenancy.

When you are finished editing, click the "Update" button to return to the tenancy overview screen.





Deleting a Tenancy

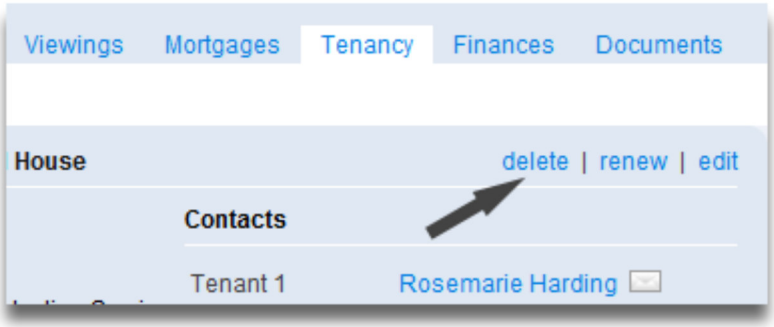
^ Top

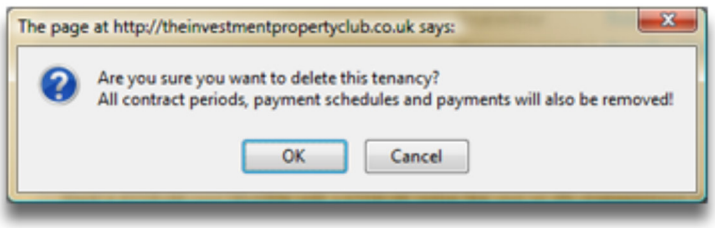
Select the property and choose the "Tenancy" tab.

Click the "delete" link on the tenancy you wish to remove.

The software will ask you to confirm the deletion, click "Ok" to remove the tenancy.

Note that all data related to the tenancy you remove will also be deleted.




The page at http://theinvestmentpropertyclub.co.uk says:
Are you sure you want to delete this tenancy?
All contract periods, payment schedules and payments will also be removed!
OK
Cancel

Adding a Contract Period

^ Top

Note that the software can automatically fill out the details of the new contract period for you if you use the "renew" feature (see "Renewing a Tenancy" for more details).

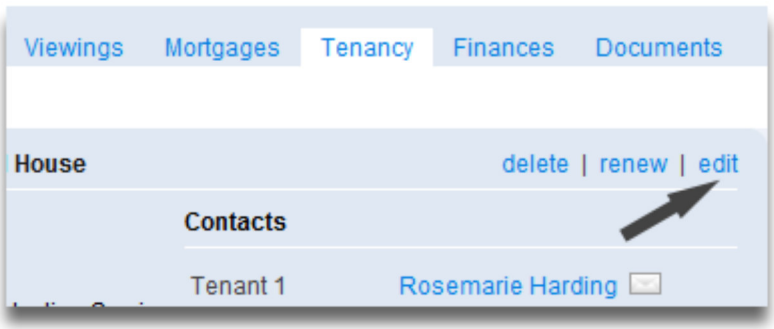
Select the property and choose the "Tenancy" tab.

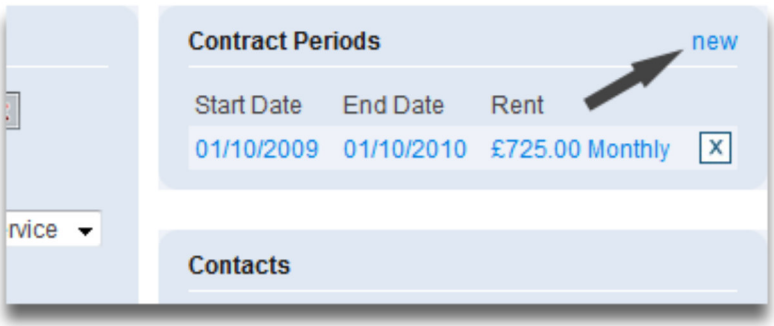
Edit the tenancy you wish to add a contract period to (see "Editing a Tenancy" for more information).

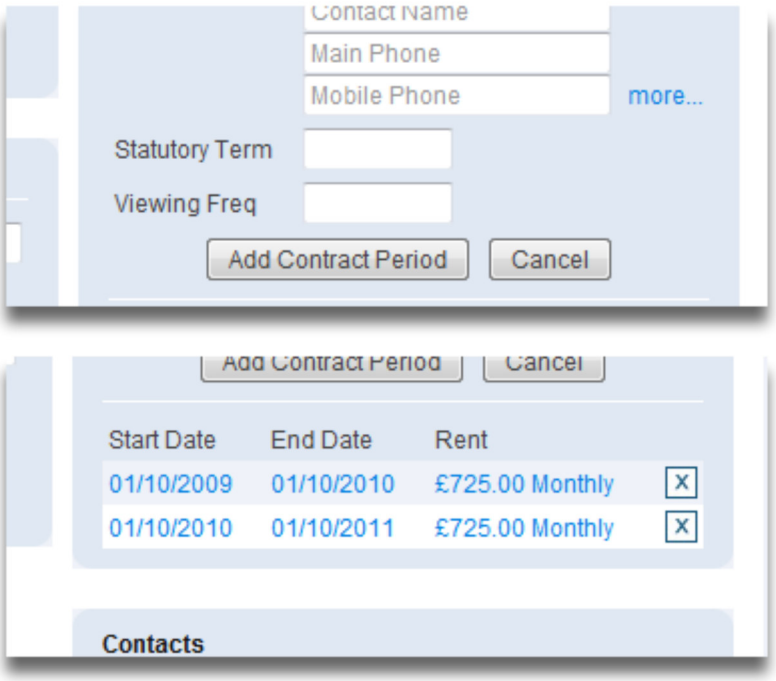
In the "Contract Periods" section, click the "new" link.

Fill in the details of your new contract period and click the "Add Contract Period" button to set up the new period.

The new contract period will now appear in the list of contract periods for the selected tenancy.







Editing a Contract Period

^ Top

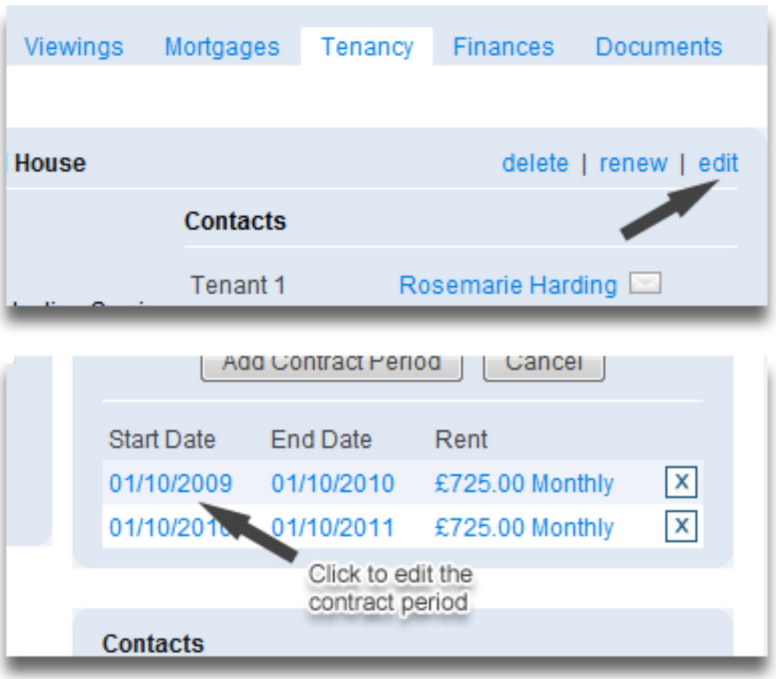
Select the property and choose the "Tenancy" tab.

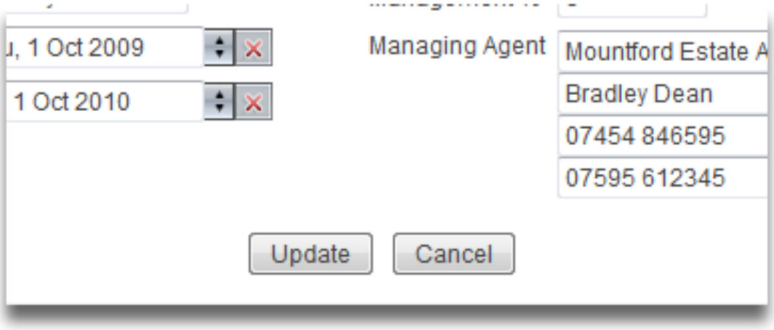
Edit the tenancy you wish to add a contract period to (see "Editing a Tenancy" for more information).

In the "Contract Periods" section, click the contract period you wish to edit.

When you are finished editing, click the "Update" button to save your changes.

Note that if you alter the contract period start or end date then the rent payment schedule will automatically be recalculated for you.





Deleting a Contract Period

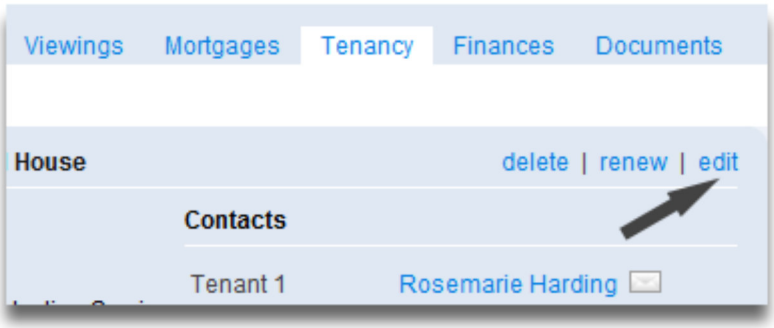
^ Top

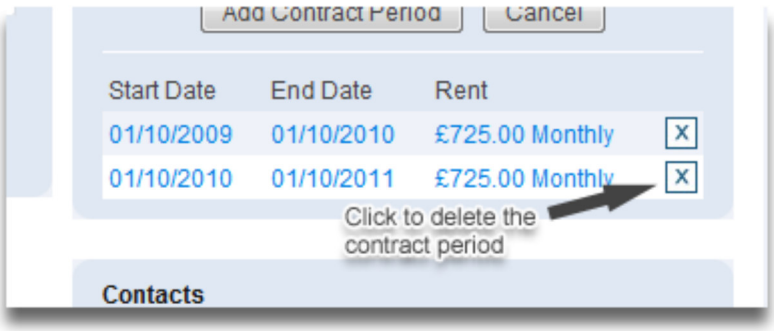
Select the property and choose the "Tenancy" tab.

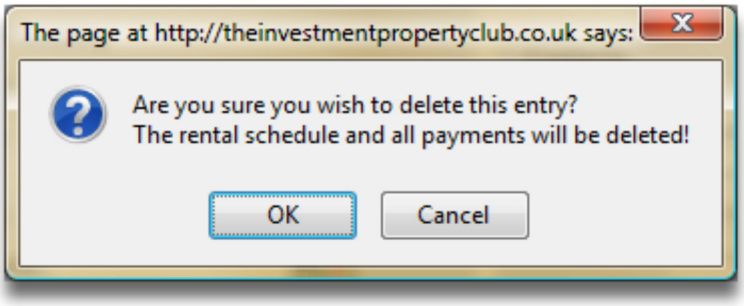
Edit the tenancy you wish to add a contract period to (see "Editing a Tenancy" for more information).

Click the "delete" button next to the contract period you wish to remove.

The software will ask you to confirm the deletion, click "Ok" to remove the contract period.






The page at http://theinvestmentpropertyclub.co.uk says:
Are you sure you wish to delete this entry?
The rental schedule and all payments will be deleted!
OK
Cancel

Paying Rent in Full

^ Top

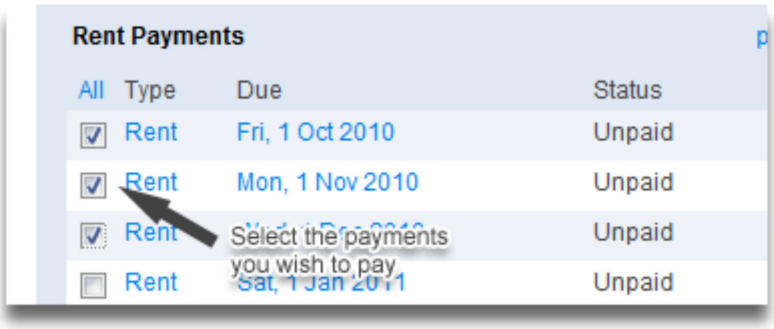
Select the property and choose the "Tenancy" tab.

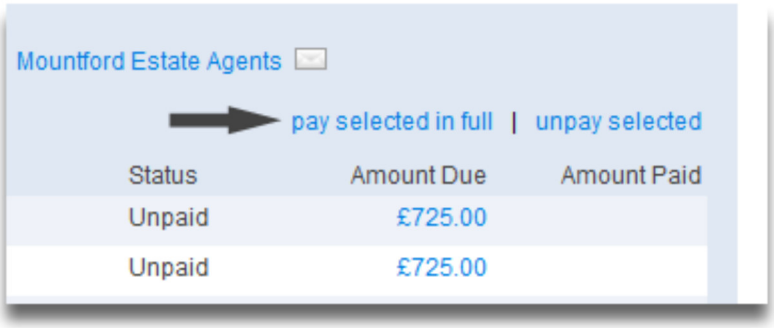
In the tenancy contract period section select the contract period and the rent payments you wish to pay in full or click the "All" link to select all rental payments.

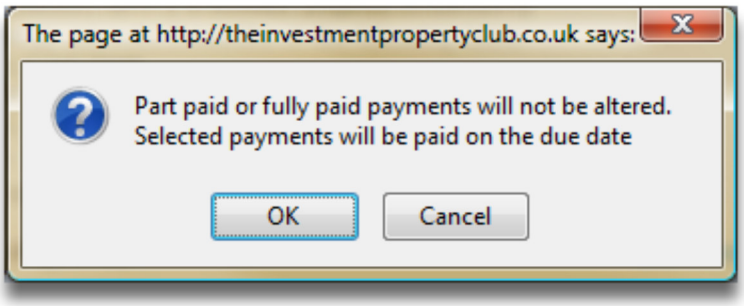
Click "pay selected in full".

The software will ask you to confirm that you wish to continue, click "Ok" to make the rental payments.

Contract Periods
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Thu, 1 Oct 2009 to Fri, 1 Oct 2010
setup fee and an
Viewings are every 3 months on the following dates:
Fri, 1 Oct 2010


Rent Payments
All Type Due Status
Rent Fri, 1 Oct 2010 Unpaid
Rent Mon, 1 Nov 2010 Unpaid
Rent Unpaid
Select the payments you wish to pay
Rent Unpaid




The page at http://theinvestmentpropertyclub.co.uk says:
Part paid or fully paid payments will not be altered.
Selected payments will be paid on the due date
OK
Cancel

Editing a Rental Payment

^ Top

Select the property and choose the "Tenancy" tab.

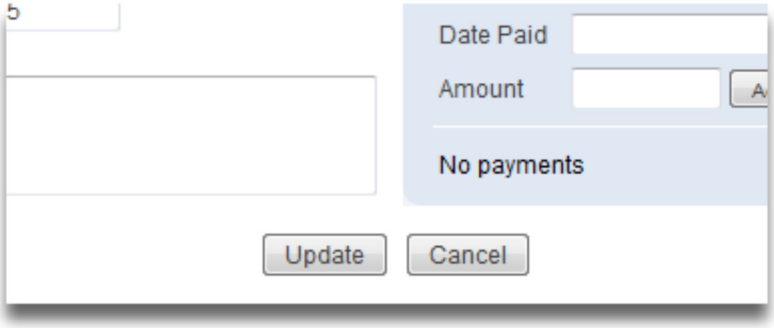
In the tenancy contract period section select the contract period and then click the rental payment that you wish to edit.

You can edit the due date, amount and add notes.

When you are finished editing click the "Update" button to save your changes.

Contract Periods
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Thu, 1 Oct 2009 to Fri, 1 Oct 2010
Viewings are every 3 months on the following dates:
Fri, 1 Oct 2010

Rent Payments
Click the payment you wish to edit
All Type Status
Rent Fri, 1 Oct 2010 Unpaid
Rent Mon, 1 Nov 2010 Unpaid
Rent Wed, 1 Dec 2010 Unpaid
Rent Sat, 1 Jan 2011 Unpaid



Part Paying Rent

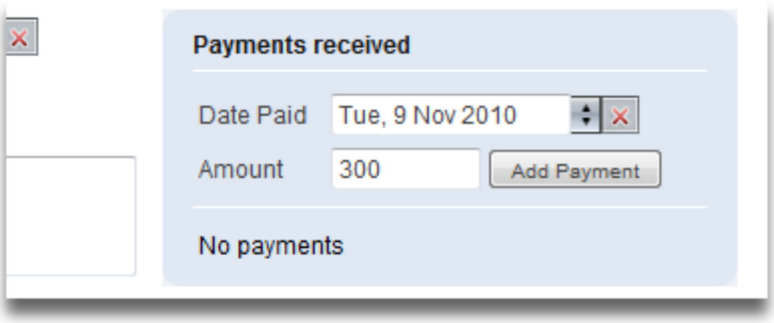
^ Top

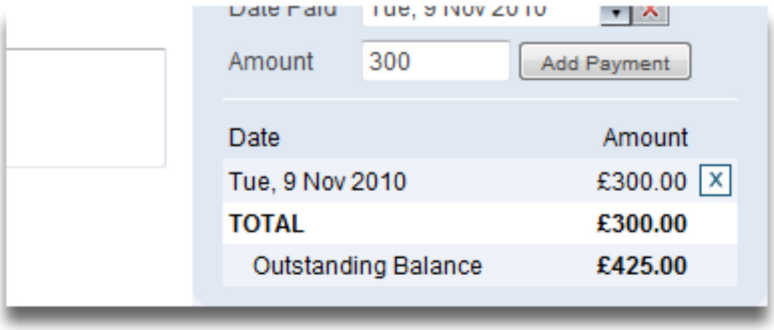
Select the property and choose the "Tenancy" tab.

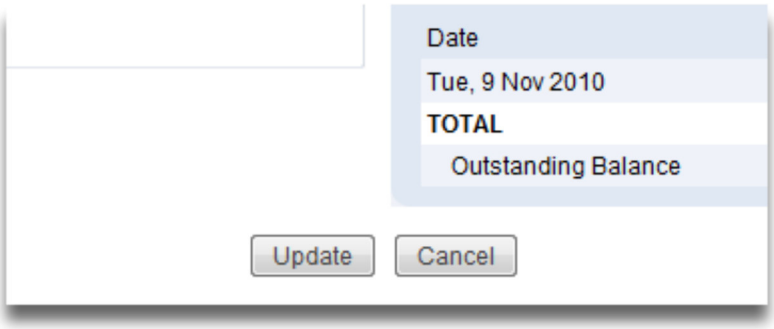
Edit the rental payment (see "Editing a Rental Payment" for more information).

In the "Payments Received" section, select the date of the payment and enter the amount then click the "Add Payment" button to make the payment.

When you are finished adding part payments click the "Update" button to return to the Tenancy screen.







Un-paying Rent

^ Top

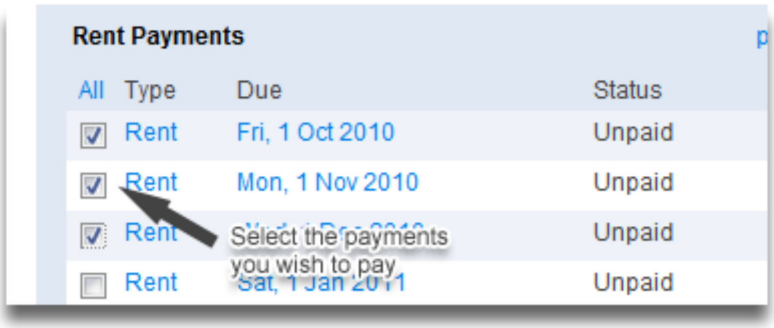
Select the property and choose the "Tenancy" tab.

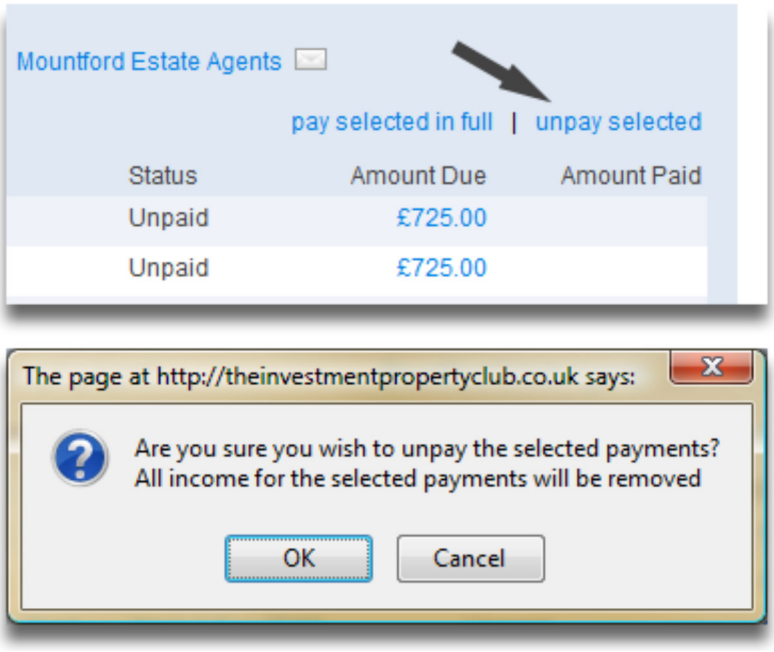
In the tenancy contract period section select the contract period and the rent payments you wish to un-pay or click the "All" link to select all rental payments.

Click "unpay selected".

The software will ask you to confirm that you wish to continue, click "Ok" to unpay the rental payments.

Contract Periods
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Fri, 1 Oct 2010 to Sat, 1 Oct 2011
Thu, 1 Oct 2009 to Fri, 1 Oct 2010
Viewings are every 3 months on the following dates:
Fri, 1 Oct 2010





About Finances

^ Top

You can keep a record of the income and expenditure against your property. This is useful for keeping track of your cash flow, preparing your tax return and keeping a live and updated history of the current financial situation across your entire portfolio.

Rental payments are automatically pulled through to the finances section as soon as they are paid and you can quickly filter your income and expenses to find the transactions you need when you want them.

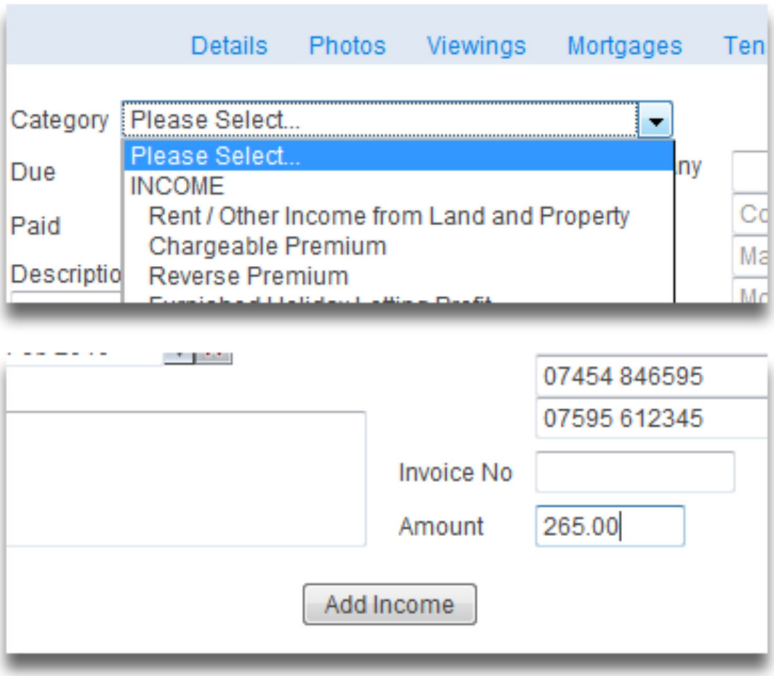
Adding Income

^ Top

Select the property and choose the "Finances" tab.

Select the category that your income falls into.

Enter the due and paid dates, the description, company and amount and then click the "Add Income" button to add the income.



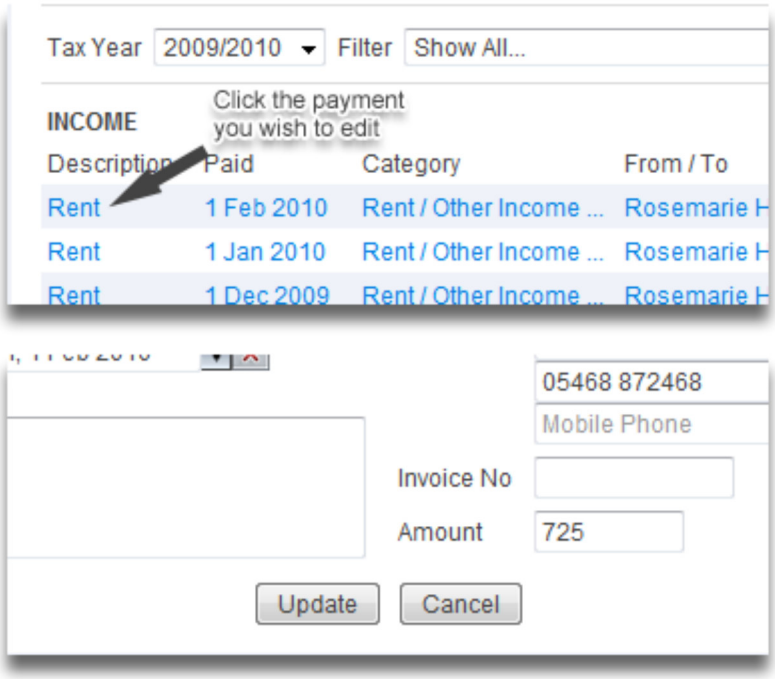
Editing Income

^ Top

Select the property and choose the "Finances" tab.

From the "Income and Expenses" section, click the income payment you wish to edit.

When you have finished editing, click the "Update" button to save your changes.


Tax Year 2009/2010
Filter Show All...
INCOME
Click the payment you wish to edit
Description Paid Category From / To
Rent 1 Feb 2010 Rent / Other Income ... Rosemarie H
Rent 1 Jan 2010 Rent / Other Income ... Rosemarie H
Rent 1 Dec 2009 Rent / Other Income ... Rosemarie H
05468 872468
Mobile Phone
Invoice No
Amount 725
Update
Cancel

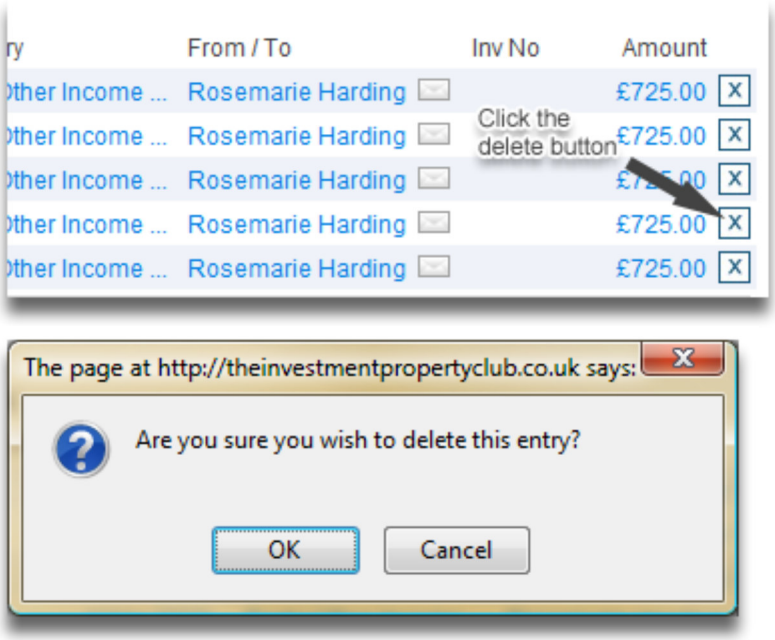
Deleting Income

^ Top

Select the property and choose the "Finances" tab.

In the "Income and Expenses" section, click the delete button to the right of the income payment you wish to delete.

The software will ask you to confirm the deletion, click "Ok" to remove the payment.



Adding an Expense

^ Top

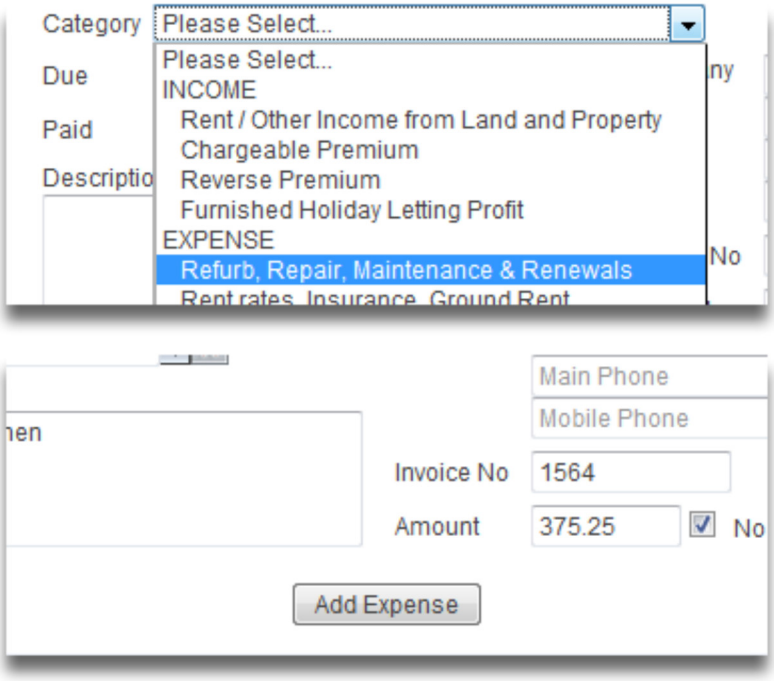
Select the property and choose the "Finances" tab.

Select the category that your expense falls into.

Enter the due and paid dates, the description, company and amount. If the expense did not include VAT then select the "No

VAT Charged" checkbox.

Click the "Add Expense" button to add the expense.



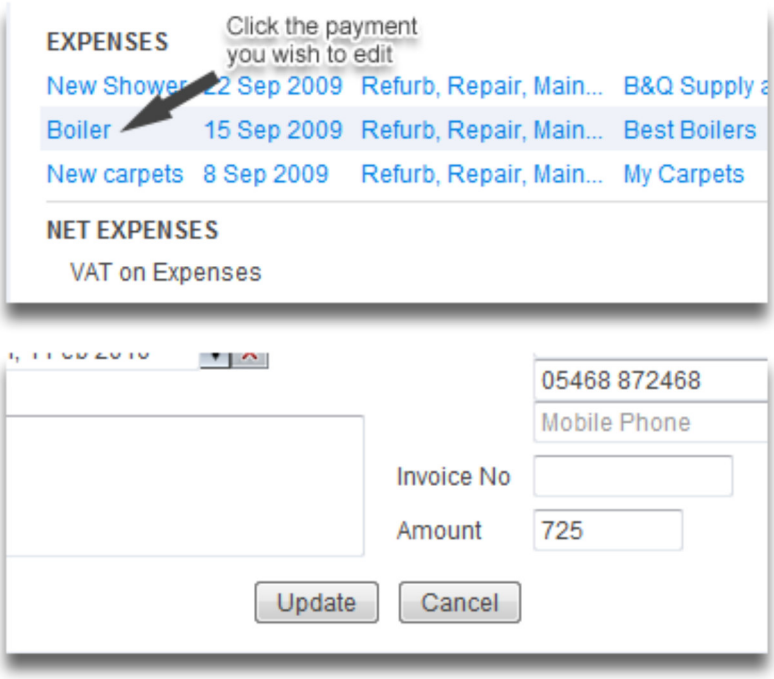
Editing an Expense

^ Top

Select the property and choose the "Finances" tab.

From the "Income and Expenses" section, click the expense payment you wish to edit.

When you have finished editing, click the "Update" button to save your changes.



Deleting an Expense

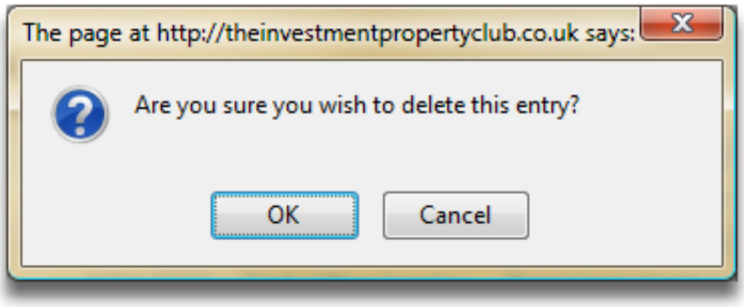
^ Top

Select the property and choose the "Finances" tab.

In the "Income and Expenses" section, click the delete button to the right of the expense payment you wish to delete.

The software will ask you to confirm the deletion, click "Ok" to remove the payment.

Click the delete button
epair, Main... B&Q Supply and Fit 154667 £15.23
epair, Main... Best Boilers 1154 £675.25
epair, Main... My Carpets mc_0956 £400.00
£1,266.91
£223.57



About Documents

^ Top

You can keep your documents stored against your property. This is useful for quickly finding the information you need later and also for keeping everything neatly in one place.

You can also access all of your documents across your entire portfolio using the "Documents" option in the left hand menu.

Adding a Document

^ Top

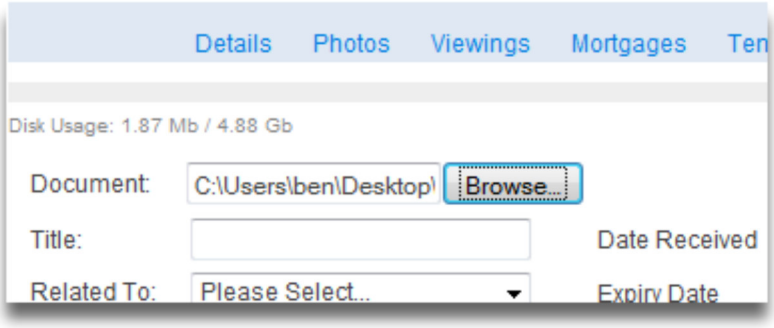
Select the property and choose the "Documents" tab.

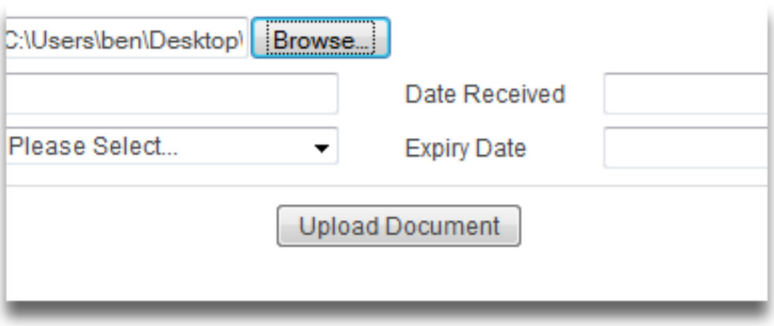
Click the "Browse..." button and locate the document you wish to add on your local PC.

Enter a title, select what the document is related to and select the date received and expiry date if appropriate. If you don't enter a title the name of the document you have selected will be used.

Click the "Upload Document" button to add your document.

Note that the size of your document and your internet connection speed will affect how long it takes for your file to upload.





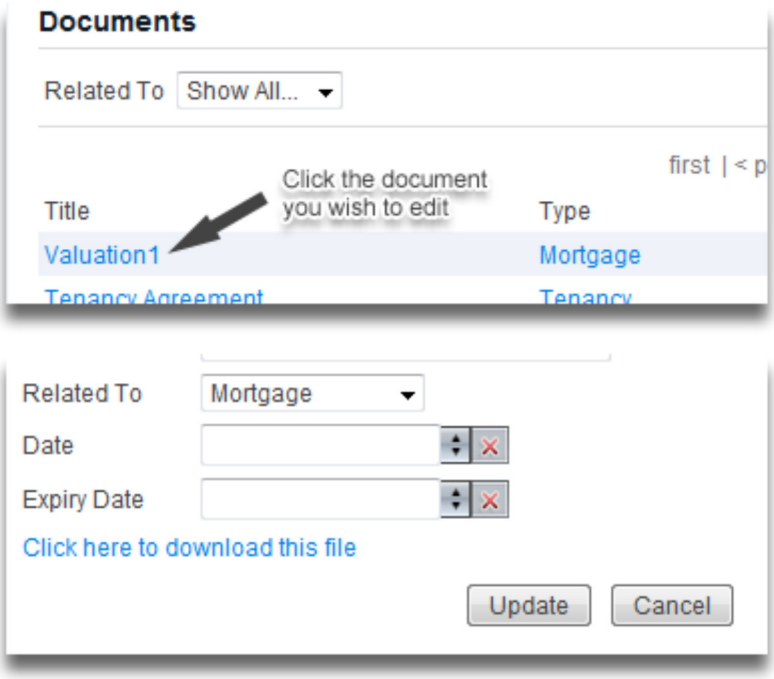
Editing a Document

^ Top

Select the property and choose the "Documents" tab.

Click the document you wish to edit from the "Documents" section

When you are finished editing click the "Update" button to save your changes.



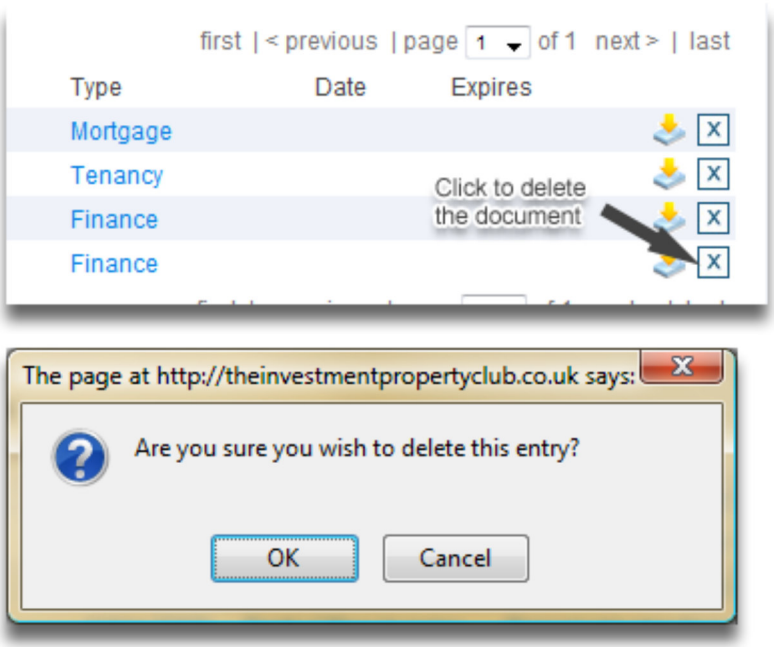
Deleting a Document

^ Top

Select the property and choose the "Documents" tab.

In the "Documents" section, click the delete button to the right of the document that you wish to delete.

The software will ask you to confirm the deletion, click "Ok" to remove the document.



Downloading a Document

^ Top

Select the property and choose the "Documents" tab.

In the "Documents" section, click the download button to the right of the document that you wish to download.

The software will prompt you for where you wish to save the document.

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